User Manual

DonorPerfect Online

DonorPerfect Fundraising Software
A quality product from
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SofterWare™

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DonorPerfect Online Service Agreement

Before using DonorPerfect Online Software please make sure that you (a) have read and understood this Service Agreement and (b) have agreed to all of the terms and conditions of this Agreement listed below on behalf of your organization ("Client"). This Agreement is between Client and SofterWare, Inc., a Pennsylvania corporation having a principal place of business at 132 Welsh Road, Suite 140, Horsham, PA 19044 ("SofterWare"). Upon your acceptance, this Agreement will become effective immediately. If you do not accept this Agreement, however, SofterWare is unwilling to provide the Services (defined below) to Client.

Services and Use of DonorPerfect Online.

SofterWare will provide the following services to Client (the “Services”): [windows; a browser interface;] access to the DP Online software product and its updates (“DP Online”); data encryption and storage in connection with use of DP Online; services listed in any quote provided by SofterWare to Client; and such other services as Client and SofterWare may agree from time to time. SofterWare grants to Client, subject to the terms and conditions of this Agreement, a non-exclusive, non-sub licensable and non-transferable license to access and use DP Online for up to the number of user ID’s for by Client. SofterWare reserves the right to improve and modify DP Online at any time and will notify Client by email after any material change. SofterWare will use commercially reasonable efforts to ensure that DP Online is accessible during normal business hours, excluding scheduled maintenance periods. Client acknowledges that because Services are delivered over the Internet, interruptions or slow service may occur. Client is responsible (a) for obtaining and maintaining all computer hardware, software and communications equipment needed to access the Services, and (b) for paying all third-party access charges (e.g., ISP, telecommunications) incurred by Client while using the Services.

Access, Security and Confidentiality.

SofterWare will provide to Clients a unique login identification and password to gain access to DP Online. Client will only reveal the identification and password to Client’s authorized users. Client will use DP Online in compliance with all applicable laws, including without limitation copyright, trademark, obscenity, and defamation laws. Neither Client, nor any person accessing DP Online by means of Client's account, will: (a) directly or indirectly, reverse engineer, decompile, disassemble, or otherwise attempt to discover the source code or underlying ideas or algorithms of DP Online; (b) modify, translate, or create derivative works based on the DP Online; or (c) sublicense, rent, lease, distribute, assign, or otherwise transfer rights to the DP Online or the Services. SofterWare retains exclusive ownership throughout the world of DP Online. During the term of this Agreement and at all times thereafter, neither party will disclose, sell or transfer to any third party, other than for the performance of this Agreement, any confidential information of the other party without the express, prior written consent of the other party. Confidential information includes Client’s data, Client’s identification and password, and the source code for DP Online, but does not include information (1) generally known to the public, (2) already known to the party receiving the information, or (3) legally obtained from a third party without further duties of confidentiality. SofterWare will use commercially available security software for encryption of Client’s data. Client acknowledges that transmission of data over the Internet may not be secure, however, even after reasonable security measures have been taken. All data remains the sole property of Client. Client may download Client’s data for free via the standard reporting parameters provided by DP Online any time during the term of this Agreement. SofterWare will provide Client’s data to Client, upon request, in a non-standard format for a $50 fee. SofterWare is not responsible for storage or retention of Client’s data more than thirty (30) days after termination of this Agreement.

Payment.

The regular billing period for use of DP Online will start the day after Client is able to access DP Online. Client will provide SofterWare with accurate and complete contact and billing information. Client will pay SofterWare the then-applicable fees for the Services as more fully described in any quotes provided by SofterWare to Client (the "Fees"). SofterWare reserves the right to change the Fees and to institute new fees or charges upon sixty (60) days prior notice to Client, provided that SofterWare will not change the Fee for access to DP Online during any fully pre-paid twelve (12) month term. All Fees for access to DP Online are payable in advance for a one month or twelve (12) month period based upon Client's choice of a monthly or annual term of this Agreement. Any term of less than twelve (12) months require ACH payment processing to be established. All Fees for Services other than access to DP Online are payable within thirty (30) days after the invoice date. All payments are non-refundable.

Termination.

The term of this Agreement is monthly or annual (based upon Client's choice), and will automatically renew for additional like monthly or annual terms (as applicable) unless either party requests non-renewal at least thirty (30) days prior to the renewal date. SofterWare may terminate this Agreement immediately or suspend providing Services to Client, including access to DP Online, (a) upon any material breach of this Agreement by Client (such as failure to pay within thirty (30) days for Services) or (b) if SofterWare determines that Client may be performing activities harmful to SofterWare or other users of DP Online. In addition, either party may terminate this Agreement by notifying the other party at least forty-five (45) days in advance. Sections 2 (with regard to confidentiality only) and 4 through 7 will survive termination of this Agreement.

Warranty Disclaimer.

SOFTERWARE DOES NOT REPRESENT, WARRANT OR GUARANTEE THAT THE SERVICES WILL BE UNINTERRUPTED OR ERROR-FREE. THE SERVICES ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, AND SOFTERWARE DISCLAIMS ALL WARRANTIES, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT

Limitation of Liability and Damages.

SOFTERWARE'S AGGREGATE LIABILITY FOR ANY AND ALL CLAIMS ARISING UNDER THIS AGREEMENT UNDER ANY LEGAL THEORY WILL NOT EXCEED THE AMOUNT OF FEES PAID BY CLIENT TO SOFTERWARE UNDER THIS AGREEMENT IN THE SIX (6) MONTHS PRIOR TO THE CLAIM ARISING. SOFTERWARE WILL NOT BE LIABLE IN ANY EVENT FOR: LOSS OR INACCURACY OF DATA; LOSS OF PROFITS OR REVENUE; BUSINESS INTERRUPTION; INDIRECT, SPECIAL, PUNITIVE, INCIDENTAL OR CONSEQUENTIAL DAMAGES; OR THE COST OF ANY SUBSTITUTE SERVICE, WHETHER OR NOT FORESEEABLE AND EVEN IF SOFTERWARE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

Miscellaneous.

This Agreement is binding on and inures to the benefit of the successors and assigns of the parties; provided that Client may only assign this Agreement with the prior written consent of SofterWare. This Agreement is between SofterWare and Client and is not for the benefit of any third party (including, if applicable, any third party accessing the Services by means of an account established by Client). No agency, partnership, or joint venture is created as a result of this Agreement, and neither party has any authority to bind the other party. All notices under this Agreement must be in writing but may be sent by email. The failure of either party to exercise any right under this Agreement will not be deemed a waiver of that right or any further rights. If any provision of this Agreement is found to be unenforceable or invalid, then the remainder of this Agreement will remain in effect. Neither party will have any liability for delay or failure in performance of any term of this Agreement to the extent that such delay or failure is caused by any cause not within such party’s direct control, other than financial inability. This Agreement is

governed by and construed in accordance with the laws of the Commonwealth of Pennsylvania regardless of the conflict of laws rules of any jurisdiction. Any dispute arising under this Agreement that cannot be resolved by the parties will be exclusively resolved by the state or Federal courts located in Montgomery County, Pennsylvania. This Agreement, together with any pricing quotes received by Client from SofterWare, is the complete and exclusive statement of the mutual understanding of the parties and supersedes all previous written and oral agreements, communications and other understandings relating to the subject matter of this Agreement. All modifications to or waivers of this Agreement must be in a writing signed by both parties, provided that SofterWare may perform additional Services for Client based upon Client's email request and Client will then pay SofterWare for such additional Services at SofterWare's then current rates.

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1. Getting Started

Introduction

As a nonprofit organization, nothing is more critical to the success of your mission than growing relationships with your donors, volunteers, foundations and other constituents. For over twenty years, DonorPerfect Fundraising Software has given development staff and executives the tools they need to achieve these fundraising goals.

- Common fundraising activities such as annual appeals, capital campaigns, special events, contact management, grant tracking and more are a snap!
- You can track and manage unlimited data in one easily customized database.
- Sophisticated analysis helps identify the source of your next big gift.
- Easily merge donor data into customized thank-you letters, e-mails and direct mail.
- Enter, recognize and manage every gift and pledge quickly and accurately.
- Quickly generate reports on grants, campaigns, and events.
- Integrated payment processing by bank draft or credit card helps save time and improve results for online fundraising, recurring gifts and more!

Logging In and Out of DonorPerfect Online

Logging into DonorPerfect Online

The main login Screen for DonorPerfect is located at the following URL:

https://www.donorperfect.net

Enter your **User ID** and **Password** and click the **Log In** button to log in.

Logging Out of DonorPerfect Online

To log out of DonorPerfect Online, simply click on the **Logout** button in the upper right corner of the screen. You will be logged out and returned to the main login screen.

Closing the Browser Without Logging Out (Forced Login)

If a user closes their internet browser without logging out of DonorPerfect Online (not recommended), their next attempt to login may cause a "Force Login" message to display:

This message indicates that DPO found an existing open session for that user id.

- If the user clicks the **Continue** button, the system will close out the open session before logging them into the system.
- If the user click the **Cancel** button, they will be returned to the login screen.

This feature is intended to prevent problems caused by users exiting their browsers without logging out of DonorPerfect Online. Previously, this caused those sessions to remain open on the server until they timed out, which could take up to two hours depending on system settings. For users with a small number of concurrent user licences, this could lead to situations where they were unable to log back in, because the open sessions were using up all the concurrent licenses.

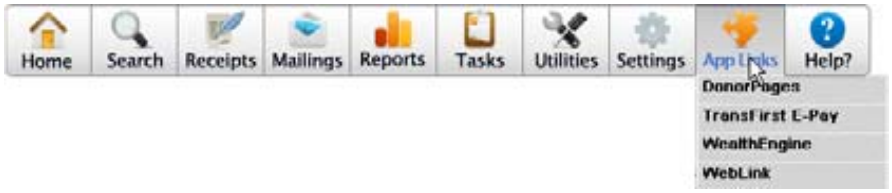
Introduction to the DonorPerfect Online User Interface

This section covers the basics of the DonorPerfect Online user interface so that you can find your way around.

Navigation Bar

The navigation bar is located at the top of every screen in DonorPerfect Online. It is your primary way of navigating between the screens of the application.

Some buttons on the navigation bar can simply be clicked on to go to the corresponding screen. Others open up a menu that displays multiple screens that you can select from:



The top-level buttons are:

Displays the Personal Dashboard, a customizable screen that forms the home page of DonorPerfect Online (see page 20).

Displays the Search screen, allowing you to search for constituent records. Once you have found a constituent record that you want to enter information for, you can begin entering information in the data entry screens. See “Entering Data” page 27 for details.

Displays the Receipts and Acknowledgments screen, which allows you to generate verification listings and mail merge data files for donations. See “Generating Receipts and Acknowledgments” on page 91 for details.

Displays links to screens that are used to produce mailings and communicate with donors. See “Generating Mailings” page 115 for details.

Displays links to various categories of reports that you can use to analyze the donor information in your system. See “Working with Reports” page 183 for details on using reports.

Displays links to a number of basic tasks such as batch entry, EFT, moves management and generating pledge reminders. See “Performing Tasks” page 269 for details.

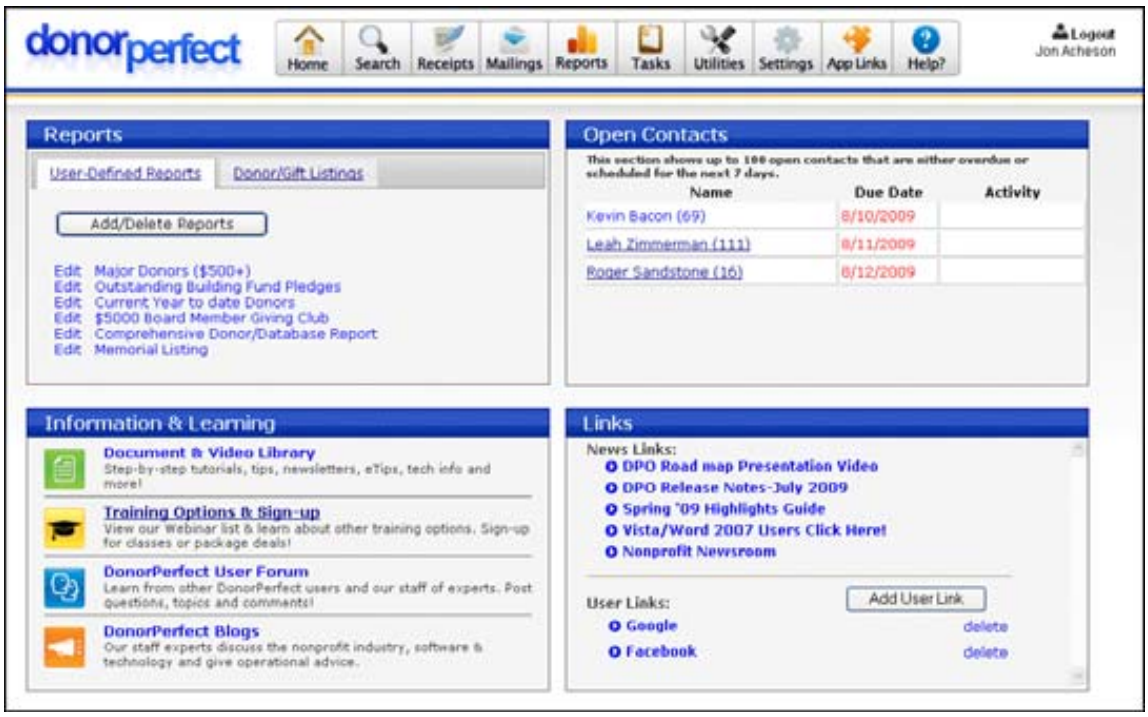
Displays links to a number of utility screens that allow you to perform various useful functions and customize DonorPerfect to your needs. See “Using Utilities” page 305 for details.

Displays links to screens that allow you to configure settings for the application and its features. See “Configuring Settings” page 351 for details.

Displays links that allow you to connect to other online applications such as DonorPages, TransFirst E-Pay, WealthEngine and WebLink. See “Application Links” page 423 for details.

Displays links to the online help system, as well as other sources of information and assistance. See “Help Menu Options” page 427 for details.

Personal Dashboard



The Personal Dashboard is a customizable screen that provides quick access to your commonly used reports, open contacts, and web pages. It is the first screen that appears once you log into DonorPerfect. Each user's Dashboard can be customized to meet their needs.

Activating the Dashboard

▶ To activate the dashboard

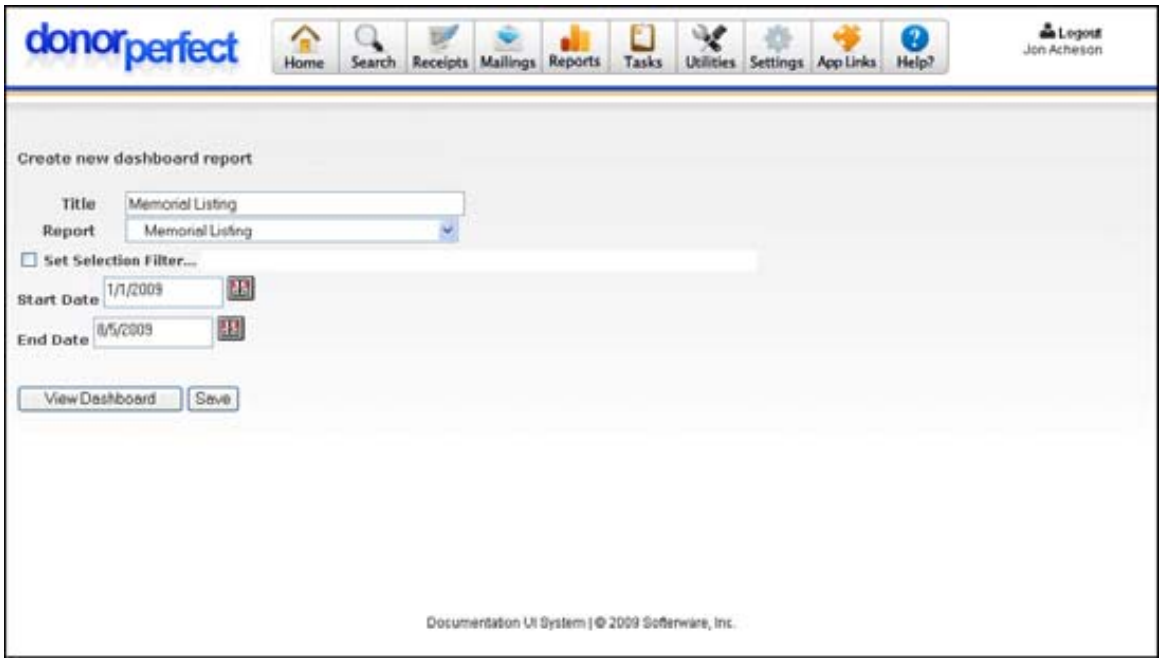
1. Select **Settings**, and click **User Security**.
2. Click the **Edit** link next to your User ID.
3. In the **Utilities** section, check the **Dashboard** check box.
4. Click **Save**.
5. Log out, and log back into DonorPerfect Online.

Using the Reports Area of the Dashboard

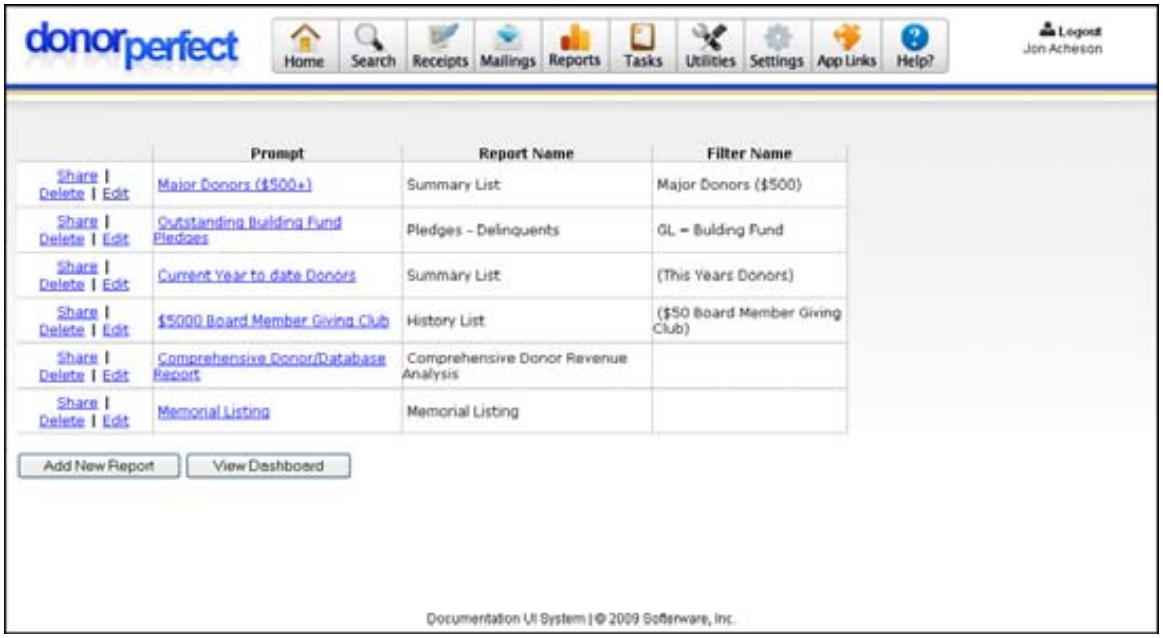
Using User-Defined Reports

Once you have activated the Dashboard, you may add or delete reports by clicking the **Add/Delete Reports** button on the startup screen**.** You may also edit selected reports by clicking the **Edit** link beside the necessary report.

Any selection filter saved on the **Create new dashboard report** screen will be used each time the report is run. Several listings may be created, for instance, each with a different filter to get the exact data desired.



Back on the Edit Dashboard Reports screen, the filter name is listed along with the report to make it easy to know which report to run, edit, or delete.



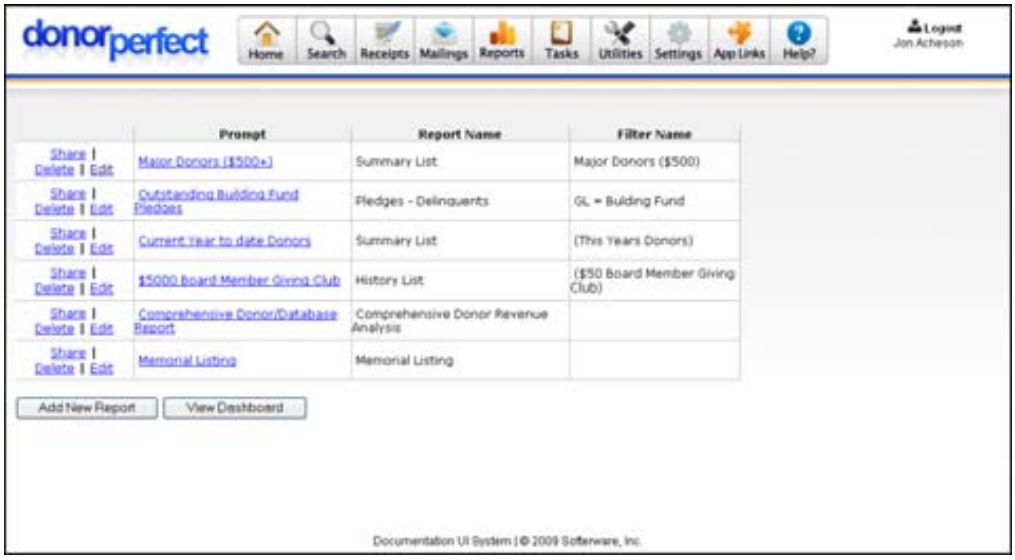
Sharing Dashboard Reports with Other Users

You can share the reports you create for your Dashboard with other users in your system. This is a useful feature if you're creating reports that other people (e.g., your manager or your board) need to review.

Note: When you share a report, a copy is created and placed in the Dashboard for the person you shared it with. This means that if you make changes to the report or delete the report, those modifications will not affect the shared copies.

▶ To share a report

1. On the startup screen, click the **Add/Delete Reports** button in the **Dashboard** section. A list of the reports you've set up for your Dashboard appear.



2. Find the report you want to share, and then click the **Share** link to the left of the report name. A popup appears with a list of the users in your system.

3. Check the users you want to share the report with, click the **Submit** button, and then click **Close Window**. The report is shared with the users you selected—they will now be able to access it when they log into their systems.

Donor/Gift Listings

The **Donor/Gift Listings** tab of the Reports section allows you to generate listings of your donors and gifts.

▶ To generate a listing

1. Select one of the following reports:
   - **Top Donors** – Lists the donors who have contributed the most money recently.
   - **Last Donors** – Lists the donors who contributed most recently.
   - **Top Gifts** – Lists the gifts with the highest dollar value.
   - **Last Gifts** – Lists the gifts that were given most recently.
2. Select Count to specify the number of donors or gifts that will be displayed, or Percent to display a percentage of the donors or gifts.
3. Specify the value for the count or percentage.
4. Click the **View Report** button.

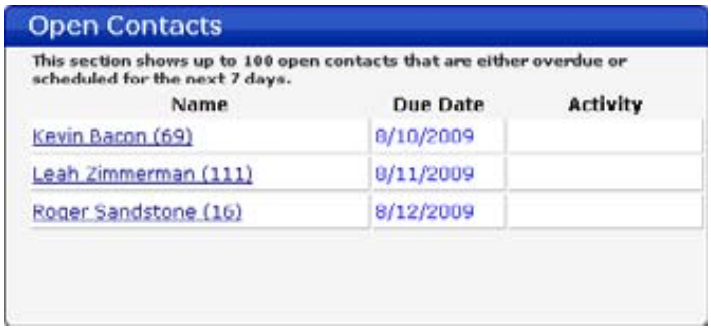
Information & Learning

This section links to other sources of information about DonorPerfect Online:

- **Document & Video Library:** This page provides a wide selection of support documents and training videos for DonorPerfect Online and DonorPerfect Visual Edition.
- **Training Options & Sign-up:** View the list of available training options and sign up for classes.
- **DonorPerfect User Forum:** This online forum provides an online discussion area where you can discuss problems, issues and suggestions with the staff of SofterWare, Inc.
- **DonorPerfect Blogs:** Online articles written by our staff that provide news, solutions and strategies to improve your fund-raising using DonorPerfect.

Open Contacts

As part of the Dashboard, you can view all open or overdue contacts that have been assigned to you.

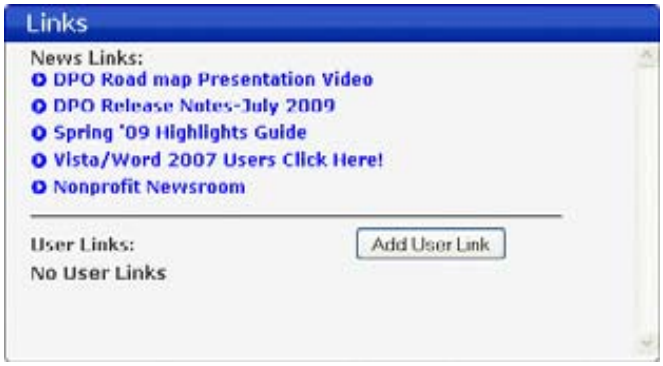


Open contacts appear if they have a Due Date between the current date and a week from now. Overdue contacts appear in red.

Click on the name of the donor to go to the Main Entry screen for that donor. Click on the due date to go to the contact record.

Links

The **Links** area of the Dashboard lists news from SofterWare, Inc. about DonorPerfect Online. You can also add your own links to other web pages in the User Links section.



User Links

You have the ability to add links to web pages to your Dashboard. This is a great feature that lets you add links to sites you use frequently and want at your fingertips.

▶ To add a user link

1. In the **Links** section of the Dashboard, click the **Add User Link** button. The **Add a Dashboard Link** screen appears.

2. In the **Link Address** field, enter the URL for the page you want to link to.
3. In the **Link Description** field, enter the text you want to appear on the Dashboard for this link.
4. Click **OK**.

▶ To delete a user link

1. Next to the user link you want to delete, click the **Delete** link. The link is removed from the system.

Getting Help

To access the online help features of DonorPerfect Online, click on the **Help** button in the navigation bar and select **Online Manual**. (Clicking **F1** on the keyboard just opens the help for your web browser.)

For more details on the functions available in the Help menu, see "Help Menu Options" on page 427.

Notes on Using Web Applications

Enable JavaScript

In order for DonorPerfect Online to function properly, you must enable JavaScript in your web browser.

DonorPerfect Online will not run on web browsers that don't support JavaScript.

Avoid Using the Back Button

Avoid using the Back button in your web browser while working in DonorPerfect Online, as this has the possibility to undo your work or interfere with the application. Instead, use the application's navigation bar to move around between screens.

Do Not Bookmark Internal Screens

Do not create bookmarks for any of the internal screens of DonorPerfect Online. You must log into the application through the login screen and then navigate to the screens using the navigation bar.

The only screen that you should create a bookmark for is the login screen.

Supported Browsers

DonorPerfect Online has been designed to run in almost all browsers. We support the following browsers:

- Internet Explorer 6.0+
- Mozilla Firefox
- Safari running on Mac OS X

For more details on browsers, see "Appendix F - Running DonorPerfect in Your Browser."

Notes on User Accounts and Concurrent User Licenses

The number of users who can be logged into your DonorPerfect Online system at any one time is determined by the number of concurrent user licences your organization has purchased. Each concurrent user license allows one more person to be logged into the system at the same time as the other users.

You may have more named user accounts in the system than concurrent user licenses. For instance, Organization A might have 30 users, but only 20 concurrent licenses. This means that after the 20th user logs in, the remaining 10 users will be unable to log in until someone else logs out.

For additional information, see the following topics:

- To determine how many concurrent user accounts you have, see "Determining the Number of Concurrent User Licenses You Currently Have" on page 416.
- To add additional user accounts, see "Adding New Named Users" on page 414.
- To increase the number of concurrent user licenses your organization has, see "Ordering More Concurrent User Licenses" on page 417.

2. Code Maintenance

Codes are an important element of your DonorPerfect Online system. Each code type defines a set of legal values that may appear in one or more fields. There are many different types of codes in the system:

- *Flags* define the relationship of a constituent with their organization (Volunteer, Staff, Board Member, etc.)
- *Donor Type* codes define the kind of donor that a constituent record represents (Individual, Organization, etc.)
- *Solicitation Codes* (SOL) identify which solicitation for donations was responsible for a given donation
- *General Ledger* (GL) codes identify the account in which the funds from a donation will be deposited

Using codes helps ensure the consistency of your data throughout the system.

A *coded field* is one that only accepts values that have been entered into the system as codes of a certain type.

This section describes how to set up and manage codes in your system.

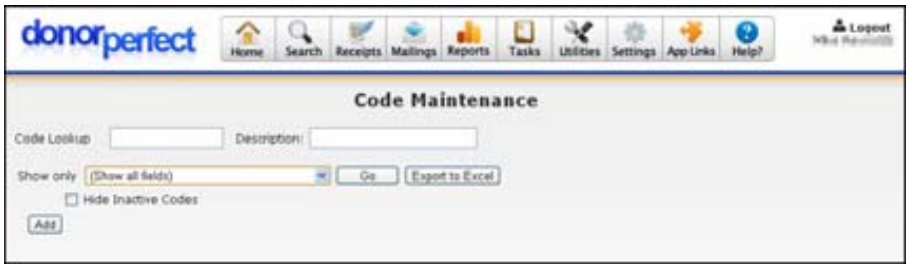
Using the Code Maintenance Screen

The Code Maintenance screen is where you enter, edit and delete the codes for your DonorPerfect Online system.

Accessing the Code Maintenance Screen

▶ To access the Code Maintenance screen

1. From the navigation bar, open the **Settings** menu and then select **Code Maintenance**. The Code Maintenance screen appears:



By default, the Code Maintenance screen does not display any of the codes that are in the system, because there may be hundreds of them.

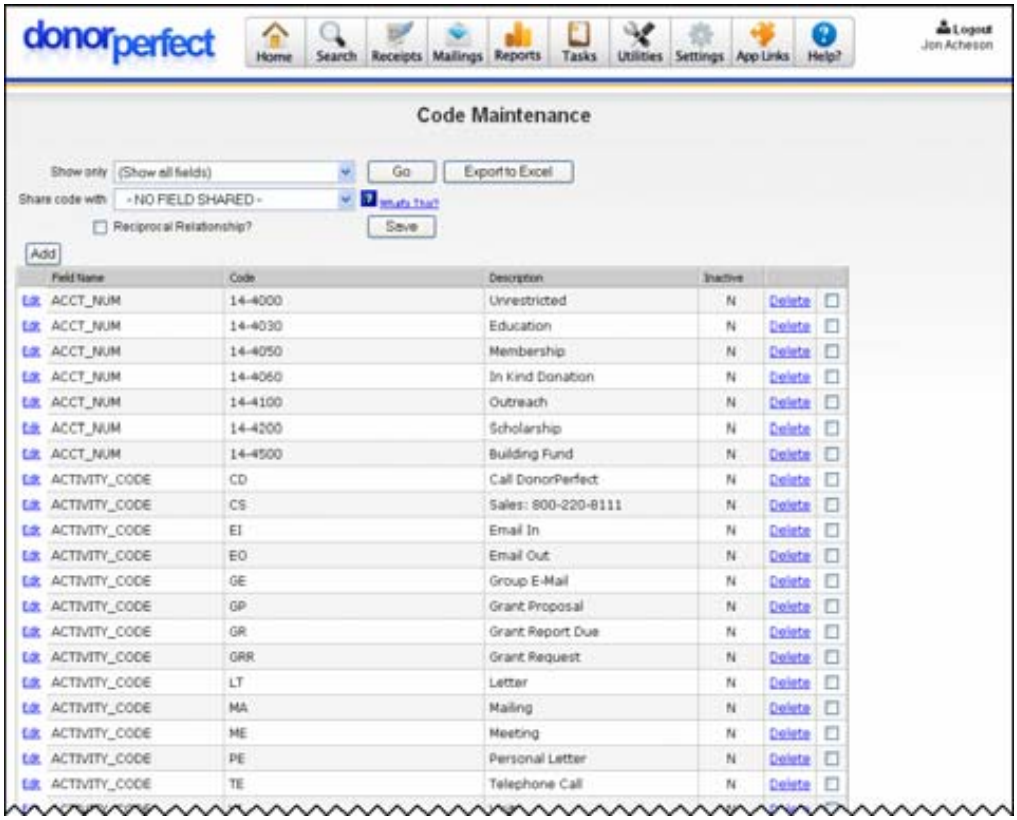
Displaying Codes

To display codes in the Code Maintenance screen, it is necessary to select a specific type of code to display. You can also choose to display all codes in the system.

For instance, select **GL Code** in the **Show Only Field**; click the **Go** button, and only General Ledger codes will show on the screen.

▶ To display codes of a selected type

1. From the navigation bar, select **Settings** and then click **Code Maintenance**. The **Code Maintenance** Screen appears.
2. From the **Show only** pull-down, choose the type of code you want to view. You can also choose **Show all fields** to see all codes.
3. If you want to prevent inactive codes from being listed, check the **Hide Inactive Codes** option.
4. Click the **Go** button. The codes of the type you selected are listed in a table:



Note: You can re-sort the code records in the Code Maintenance grid by clicking on the column headers.

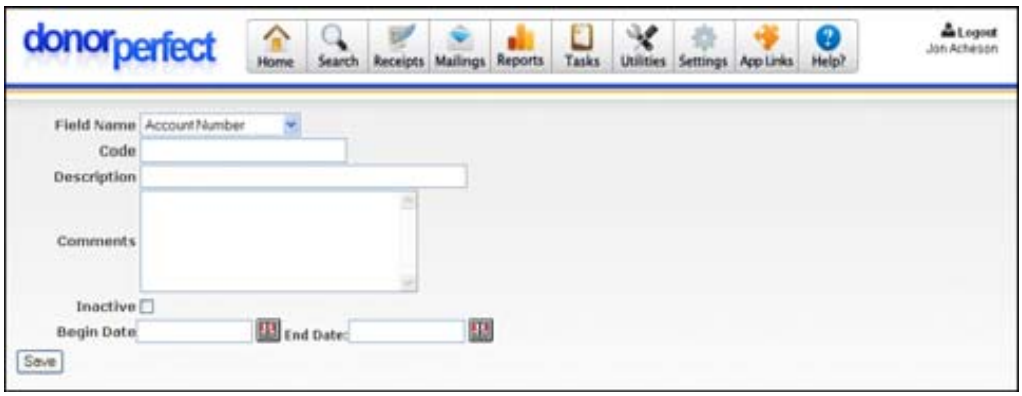
Adding a Code

You may need to add codes to your system for reasons such as you are sending a new mailing and need to add a new SOL code, or you've started a new committee and need to add a new FLAG that can be assigned to committee members.

Note: All the codes that you add for a particular field (for example, SOL, GL, FLAGS) should be the same length.

▶ To add a code

1. From the navigation bar, select **Settings** and then **Code Maintenance**. The Code Maintenance screen appears.
2. Select the type of code that you want to add from the **Show Only** list.
3. Click the **Add** button. The Add Code screen appears:



4. Enter the following information for the code:

Setting	Description
Field Name	Choose the code type from the list (for example, Flag).
Code	Enter the code (for example, BD).
Description	Enter a description for the code (for example, Board Member).
Comments	Enter any comments you want to store about the code.
Inactive	Check to make the code inactive. See "Inactivating Codes" page 360 for details.
Begin Date	The date after which the code will automatically become active. If you do not enter a date, today's date is entered by default.
End Date	The date after which the code will automatically become inactive. If you do not enter a date, January 1, 2099 is entered by default.

5. Some fields will have additional information to enter. For example, the General Ledger will have update MCAT and account number to enter. If there is additional information to complete, enter it.
6. Click the **Save** button to save your code.

Editing a Code

▶ To edit a code

1. From the navigation bar, select **Settings** and then click **Code Maintenance.** The **Code Maintenance** screen appears.
2. Select the type of code you want to edit from the **Show Only** list and click the **Go** button. The codes of the selected type will be listed in a table.
3. Next to the code you want to edit, click the **Edit** link**.**
4. Make your changes, and click **Save**.

Deleting a Code

Note: You may not delete a code that is already assigned to a record. (You will get an error message if you attempt to delete a code that is in use.) You may edit such a code, and the records containing that code will be updated to the new code. To delete a code that is assigned to records in your system, contact customer support.

▶ To delete a code

1. From the navigation bar, select **Settings** and then click **Code Maintenance**. The Code Maintenance screen appears.
2. Select the type of code you want to delete from the **Show Only** list and click the **Go** button. The codes of the selected type will be listed in a table.
3. Next to the code you want to delete, click the **Delete** link. You may also select several codes to delete at the same time. To do this check the check boxes beside the **Delete** hypertext, and click the **Delete** button at the bottom of the screen. The following message appears: **Are you sure you want to delete this record?**
4. Click **OK** to confirm.

Making Codes Inactive

If you are no longer using a code, and you don't want it to appear as an active code, you can make the code inactive. This is a useful feature when, for instance, an obsolete GL Code should no longer be available on the gift screen, but the code is still needed for reporting purposes. You may also create inactive codes for future use, which you will activate at the appropriate time.

▶ To make a code inactive

1. From the navigation bar, select **Settings** and then click **Code Maintenance.** The **Code Maintenance** screen appears.
2. Select the type of code you want to make inactive from the **Show Only** list and click the **Go** button. The codes of the selected type will be listed in a table.
3. Next to the code you want to edit, click the **Edit** link**.**

4. Check the **Inactive** option, and then click the **Save** button.

Sharing Codes between Fields

Code sharing allows you to set up different fields in your system to use the same codes. If a new code is added to one field, a corresponding code is automatically added to the shared field as well. Likewise, if the user edits or deletes a code, the matching codes would be also be modified or removed from any linked fields.

For example, if the Mailing Code field on the Contact screen is shared with the Solicit Code field on the Gift screen, adding a code to Solicit Code will also add the same code to Mailing Code.

▶ To set up code linking between fields

1. From the navigation bar, select **Settings** and then click **Code Maintenance.** The **Code Maintenance** screen appears.
2. Select the first field that you want to share codes from in the **Show only** list.
3. Click the **Go** button. The codes from the select field will be listed, and the Share Code With list will appear:

4. Select the second field that you want to share codes with from the **Share code with** list.
5. Check **Reciprocal Relationship** to ensure that codes added to the second field are also shared with the first field. If this option is left unchecked, codes added to the **Show only** field will be shared with the **Share code with** field, but codes added to the **Share code with** field will not be shared with the **Show only** field.
6. Click the **Save** button to save the change.

Tip: To link more than two fields together, set up code sharing between them in series. For instance, to share codes between fields A, B and C, set up sharing between A and B, and between B and C.

This page intentionally left blank.

3. Entering Data

The Entry Screens are where all data is entered into DonorPerfect. This is where the user can add a new record, access existing records, and edit donor information. In addition, you can enter gift, pledge, demographic, or other data to the **Main, Gift, Pledge, Contact, Bio, Other Info, Links**, or **Address** screens.

The **Search Screen** is used to add a new record or access an existing record for editing.

Using the Search Screen

The Search Screen is used to search for existing donor records in the system. Once you find a donor record, you can click on the listing to edit the data for that donor.

The Search screen also allows you to add and delete donor records.

To access the Search screen, click the **Search** button in the navigation bar.

Searching for Donor Records

▶ To search for a record in the system using the Search screen

7. Enter the Last Name, Organization Name, or ID # in the **Last Name/Org/ID#** field.

> **Note:** You can enter only the first few characters of the last name or organization, and find all records that match those first characters. For instance, searching on S would find both Sandstone and Smith.

> **Tip:** To perform a wild card search, in which a "wild card" symbol can match any one or more characters, enter the percent sign (%) before the search string. For example, %ark will return Stark, Clark, Park, etc.

8. If desired, you can enter additional search criteria in the following fields:

First Name	The first name of an individual.
Opt. Line	This field is used to enter a secondary name or company name if sending mail to a donor's work address.
Address	A street address, such as 132 Welsh Road, or 1600 Pennsylvania Avenue. If the donor's address includes a suite number, apartment number, or similar addition to the address, include it on this line as well.
City, State & Zip	Like the First Name field, these fields allow you to perform a search on them or use them to narrow a search. If you enter a last name of Jones and a State or Zip code, the system will locate only those records in the specified Zip code or State with the last name of Jones. As with the Last Name/Org/ID# field, you can enter just the first couple digits of the zip code, and the system will find all records whose zip codes begin with the specified digits.
Country	Search for all individuals in a given country.
E-mail	Search for a specific email address.

9. If desired, you can enable any of the following Search Options:

Set Selection Filter	Check to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" for details.
Search alternative addresses?	Check to search through any additional addresses that may have been entered when determining matches to the search criteria.
Find exact match?	Check to search only for records that exactly match the search criteria. For instance, searching for the last name Sand would return someone with the last name "Sand" but not "Sandstone."
Show alternative addresses in results?	Check to list alternative addresses in the search results along with the primary address.
Include similar sounding results?	If you're searching a text field, this check box enables the system to search for results that sound alike to the values you enter but may not be spelled the same way. For example, if you search for the first name of John, the system would also find Jon, Jonn, and Joan as potential matches.

10. Click on the **Lookup** button.

    The records that match the search criteria will be listed at the bottom of the screen. You can click on the links in the record entries to open those records in the Main Entry screen.

Starting Over

Click the **Clear Fields** button to clear all fields and start over.

Note: In addition to the above fields, up to ten additional fields may be added to the search screen by specifying them on the Donor Search Field Parameters screen. See "Donor Search Field Parameters" on page 380 for details.

Adding a Donor Record

If you don't find a record after searching for it in the Search screen, you can add a new record to the system using the **Add Individual** or **Add Organization** buttons that appear after a search.

Note: You should always search for the donor or organization in your system before entering a new record. Someone may have already created a record for that donor or organization. Searching first helps prevent duplicate records from being created.

To add a new record:

- Click the **Add Individual** button to add a record for an individual person. See "Entering or Editing Individual Donor Records" page 37 for details.
- Click the **Add Organization** button to add a record for a company or organization. See "Entering or Editing Organization Records" page 41 for details.

The Main Entry screen will open, and the information entered as search criteria will automatically be entered into the appropriate fields.

For details on entering information into the Main Entry screen, see "Using the Main Entry Screen," on page 30.

Deleting a Donor Record

Deleting donors is quick and easy. Please keep in mind that when you delete a donor from the system, you can no longer access their information, including gift, pledge, and any other information.

▶ To delete a donor record from the DonorPerfect system:

1. Search for the record using the Search screen. (See "Searching for Donor Records" page 27 for details.)
2. Click the **Delete** link to the right of the record listing. The following message will display:

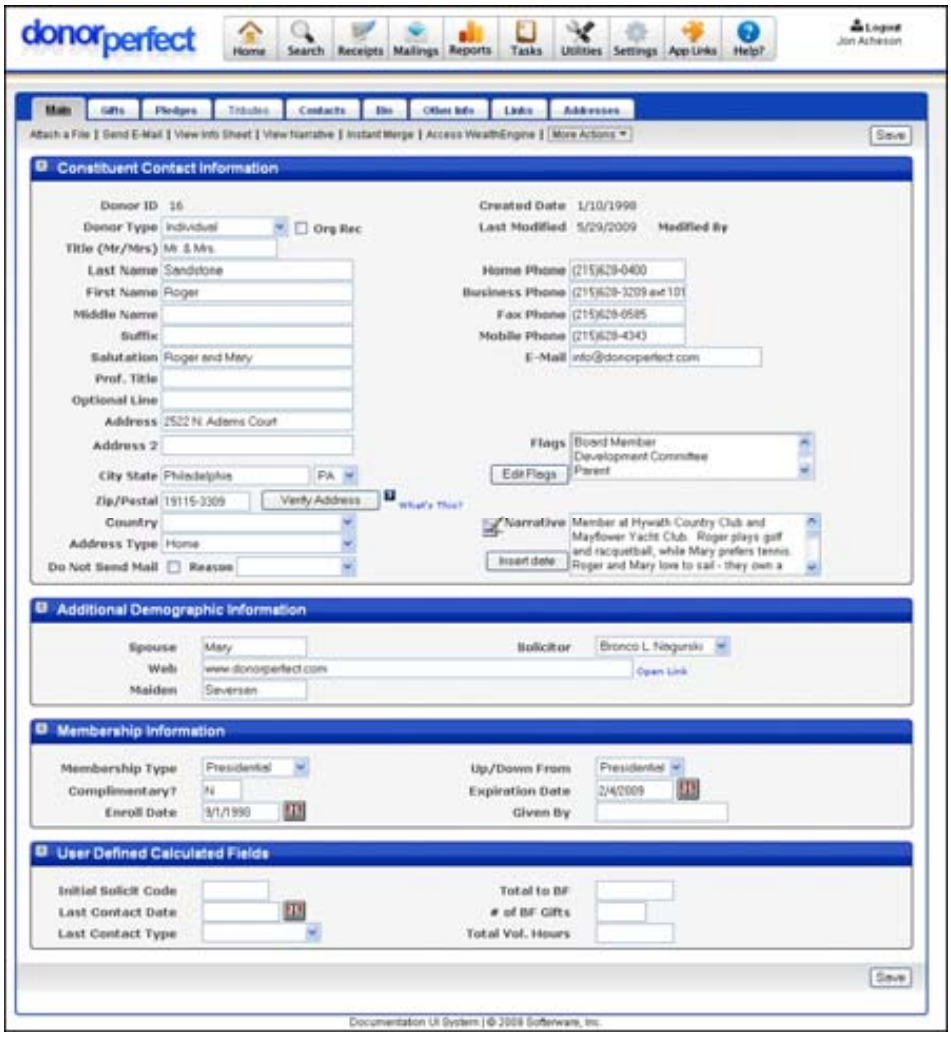
3. Click **OK** to confirm deletion, or **Cancel** to cancel deletion.

Warning! Be very sure this is what you want to do! Once a record is deleted, it cannot be retrieved.

Using the Main Entry Screen

The Main Entry Screen allows you to enter or edit basic information about each constituent, such as name, address, telephone, record type, and flags.

It is accessed from the Search screen, either by clicking on a search result link, or by clicking the **Add Individual** or **Add Organization** buttons.



This screen, like all DonorPerfect entry screens, can be modified to meet your organization's specific needs. Therefore, the figure shown may not match your layout exactly.

At the top of the screen, under the navigation bar, the main entry screen features a tab for each of the other data entry screens. Boldfaced tabs indicated that information has been entered on that screen. For instance, if the Gifts option is in **bold**, that donor has gifts entered into the system.

If there are other operations that may be carried out on a screen, they are listed in a row just underneath the tabs. They may appear as links or as buttons.

To save the information entered on any screen, click **Save** (either at the top of the screen **or** the bottom). To access any other entry screen, click the option heading.

If you are finished entering all information for the record, you can click the **Search** button in the navigation bar to lookup or add a new record.

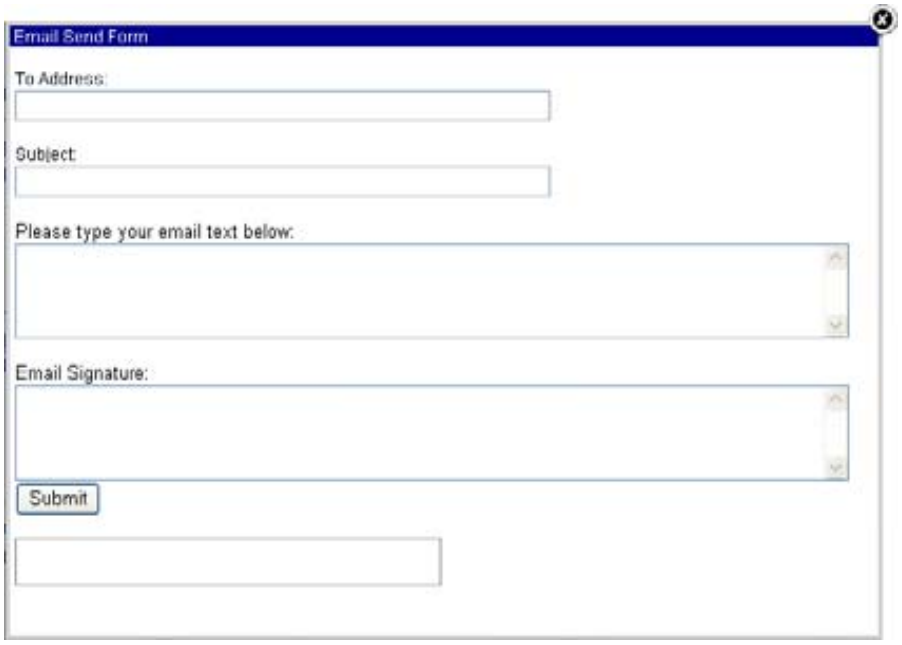
Attach a File

The **Attach a File** link at the top of the Main Entry Screen allows you to attach a file to the constituent record using the Hosted File Storage feature. See "Hosted File Storage" on page 318 for details.

Send E-mail

The **Send E-Mail** link at the top of the Main Entry Screen allows you to send an email message to the constituent whose record you are viewing. You must have Outlook or Outlook Express installed on your computer to use this system.

Clicking on the link opens an Email Send Form:



Fill in the following information:

Field	Description
To Address	The email address of the person you want to email. This will be set to the email address in the constituent record, if one has been entered.
Subject	The Subject line of the email message that will be sent.
Please type your email text below	Type the body of the email message in here.

Email Signature This text will appear at the bottom of the email message.

Once you have filled out the form, click the **Submit** button to send the email message. You will be returned to the Main Entry Screen.

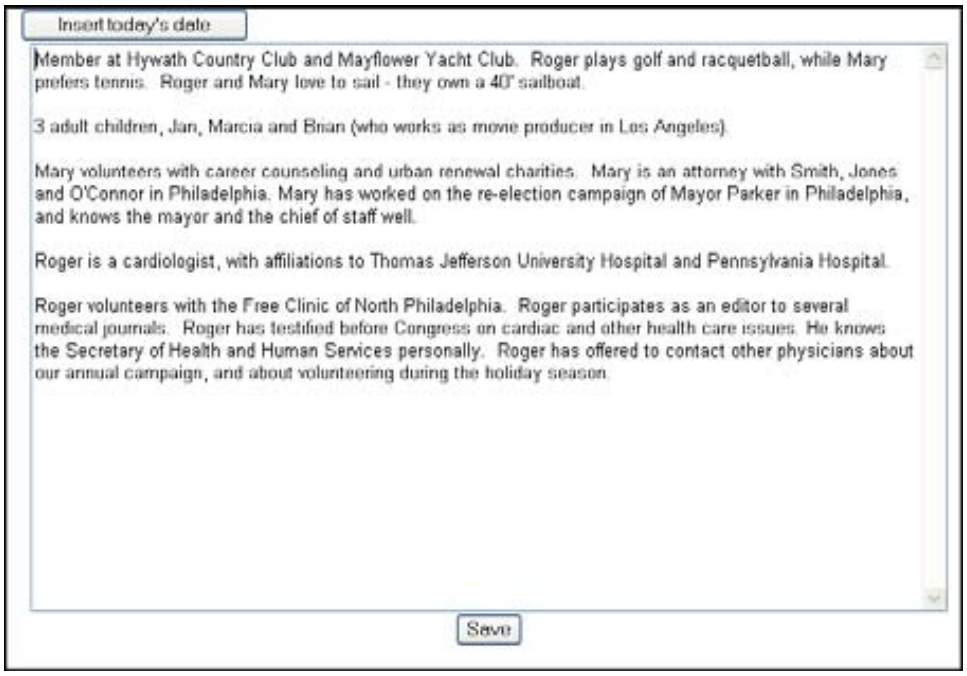
View Info Sheet

Clicking on the **View Info Sheet** link opens up the Info Sheet listing, and displays the information for the current donor.

See "Info Sheet" page 252 for details.

View Narrative

Clicking on the **View Narrative** link opens the **Narrative** field up in a new form where it can be more easily edited:



Click the **Insert today's Date** button to insert the current date into the text at the top of the narrative window.

Click the **Save** button to close the form and return to the Main Entry Screen.

Instant Merge

Clicking on the **Instant Merge** link at the top of the screen will prompt you to download a mail merge file containing the information from the current donor. See "Instant Merge" on page 451 for details.

Access WealthEngine

If the optional WealthEngine Profile service has been enabled, clicking on this link will take you to the WealthEngine website, where you can see a wealth profile report on the donor.

This icon only appears after the donor record has been saved. See "Wealth Engine" page 432 for details.

Access NOZA

The **Access NOZA** feature in the Main Entry Screen allows you to search for the current constituent in the NOZA database of charitable donors. This can help to identify constituents who have the potential to become donors, or donors who have the potential to become major donors.

The NOZA database contains over 42 million charitable donation records, gleaned from public sources of information such as annual reports or listings of donations. It is intended to be used by nonprofit agencies to search for prospective donors.

NOZA integration is available as an additional service; please contact your Account Manager for details on activation.

This feature only appears after the donor record has been saved.

Setting Up NOZA Integration

In order to use the **Access NOZA** feature, you must first have a NOZA account. SofterWare will set this up to work with your email address, and will give you the password for the account.

Once you have set up your NOZA account, you will then need to set up two fields in the User Security screen for your account, so that DonorPerfect Online will be able to connect to it.

▶ To set up DonorPerfect Online to connect to your NOZA account

1. From the Navigation Bar, select **Settings** then **User Security**.
2. In the User Security screen, click the **Edit** link next to your user account.
3. Enter the email address that was used for your NOZA account in the **Email Address** field.
4. Enter your NOZA password in the **NOZA Password** field.
5. Click the **Save** button to save your changes.

Running a NOZA Search for a Constituent

▶ To run a NOZA search for a constituent

1. Search for the constituent using the Search Screen, and open up their record in the Main Entry Screen.
2. Click the **Access NOZA** link at the top of the Main Entry Screen. A new browser window will open up, displaying the result of a search by name for the current constituent in NOZA.

More Actions

The More Actions list on the Main Entry Screen contains the following additional functions:

Action	Description
Export Data	Exports the current record's data from the Main Entry Screen as a comma-separated value text file.
Google	Opens up a new browser window containing a Google search for the constituent's name.
Google Maps	Opens up a new browser window containing a Google Maps search for the constituent's address.
Linked Donor Report	Opens up the Linked Donor Contribution report and displays the contributions for the current donor and the other donors linked to the current donor by relationships of a specified type. Typically, this feature is configured to list the donations of the donor and his or her children. See "Linked Donor Contribution Report" page 213 for details on the report. The type of relationship featured, date range, and selection filter for this button are configured on the Entry Screen Parameters screen. See "Entry Screens" page 377 for details.
View Addresses	The View Addresses action opens up a new browser window that displays a list of the secondary addresses that have been entered for the current donor.
White Pages	Opens up a new browser window containing a WhitePages.com search for the constituent's name.

Address Listing

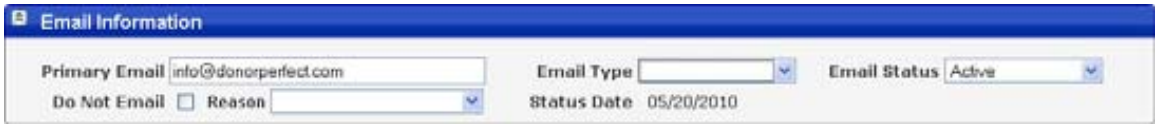
Main Address

Mr. & Mrs. Roger Sandstone 2522 N. Adams Court Philadelphia, PA 19115-3309 info@donorperfect.com	Home Phone: Business Phone: Mobile Phone: Fax Phone:	(215)620-0400 (215)620-3209 ext 101 (215)620-4343 (215)628-0585

Secondary Addresses

Adams McKinley Corporation 477 W. Virginia Drive Philadelphia, PA 19011	Home Phone: Business Phone: Mobile Phone: Fax Phone:	
446 Sea Spray Terrace Boca Raton, FL 33087-3356	Home Phone: Business Phone: Mobile Phone: Fax Phone:	
2522 N. Adams Court Philadelphia, PA 19115-3309	Home Phone: Business Phone: Mobile Phone: Fax Phone:	

Email Information for Constant Contact Email



The **Email Information** section of the Main Entry Screen contains information related to the Constant Contact Email module.

The following settings are available:

Primary Email	The primary email address for the constituent.	
Email Type	The type of email address. Choose from Work, Personal or Other.	
Email Status	Indicates whether the Primary Email is able to be used in Constant Contact email campaigns.	
	Active	The email address is currently in use by the constituent and available to be used in email campaigns.
	Do Not Email	This address should not be used in email campaigns. Typically this is a result of a request from the constituent.
	Removed	This email address has been removed from the database.
	Unconfirmed	This email address has not yet been confirmed to be correct.
	Undefined	No email address is known for this constituent.
Do Not Email	If this option is checked, the constituent will not be included in email campaigns. This is one way of handling deceased donors, for instance. This can be overridden when running mailings by selecting the Include "No Mail" Addresses option in the mail merge process.	
Reason	These are the reasons a record has been set to not receive mail. If you've selected the Do Not Email check box, choose a Reason.	
Status Date	The date on which the email address and related settings were last updated.	

Important! The information in the Email Information section is downloaded from the Constant Contact website. Changes made to the information in DonorPerfect Online will not be uploaded to Constant Contact, and may be overwritten by future updates from Constant Contact. For this reason, you should always edit this information using the Constant Contact website, not DonorPerfect Online.

Quick Tips for Data Entry

Age Calculation Screen Prompt: Any user-defined date field in DPO that has the word "birthdate" in the field name will automatically have an age calculation displayed adjacent to it. For instance, **birthdate_spouse**, if populated, would have the age displayed to the right side of the field. For details on adding a user-defined field, see "Screen Designer" page 393.

Hyperlink any Field: It is possible to add a hyperlink to the World Wide Web or to files on your computer in any User Defined Field (UDF). This feature is enabled any time the field contains **www**, **http**, **https**, or ****. **WWW**, **http**, **https** point to a web address, while the **** point to a file on your computer (**\\documents\helpfile.doc** for example).

Quick Date Entry: To enter the current date quickly during data entry, enter a slash (/) and tab to the next field. The date field will then populate itself automatically. This only works with date fields.

Extra Email Addresses: We recommend that you add extra email addresses to the system as separate addresses using the Addresses screen (see page 81). Adding user-defined email address fields is no longer recommended, as the user-defined email fields will not show up in the standard reports and default export templates.

Note: You can mark a donor as anonymous by creating a user-defined Yes/No field called ANON. To add this field, go to Settings/Screen Designer—see page 393 for more details. Once a donor is marked as anonymous, you have the ability to control which users can access this donor's information in reports. To set this user security setting, go to Settings/User Security, and edit any of your user IDs (see page 413 for more details). The *Anonymous* setting is located in the Reports section.

Entering or Editing Individual Donor Records

▶ To enter or edit a record for an individual donor

1. In the Search screen, do one of the following:
   - Search for the record you want to edit and click on the record listing.
   - Search to make sure the record doesn't already exist, then click the **Add Individual** button.
2. In the Main Entry screen, enter or edit the following fields:

Field	Description
ID #	This is the client's ID number, which is automatically assigned after the record is saved.
Org Rec	Indicates whether this record is for an individual or an organization. This box is automatically checked if the record is for an organization or company. It should be left unchecked for individual donor records.
Donor Type	Indicates whether the constituent is an Individual or Organization. An organization can also be listed as a Company, Foundation, Government, School or Vendor. These are functionally equivalent to an Organization, but help to identify the constituent more closely. A record can only have one type.
Last Name	The last name of the individual.
First Name	The first name of the individual.
Middle Name	The middle name of the individual, if any.
Salutation	Use this field to create the desired salutation for the donor. For example, if you want to address Mr. Roger Sandstone as "Dear Roger." If you leave this field blank, when a letter is created, DPO will automatically populate "Title + First Name + Last Name." If the donor does not have a title, "First Name + Last Name" will be used.
Prof. Title	The individual's professional title.
Optional Line	This field is used to enter a secondary name or company name if sending mail to a donor's work address. The optional line entry will print just above the address line on labels or envelopes. For a married donor whose spouse has a different last name, enter the complete name of the spouse in the Optional Line field, as you would want it to appear on a mailing label. Ex: Catherine L. Moore. For a donor's business address, enter the complete company name in the Optional Line field.
Address	A street address, such as 132 Welsh Road, or 1600 Pennsylvania Avenue.
Address 2	This is an additional line below the address (for example, Apartment Number, Suite #, etc.).

Field	Description
City	The city of the mailing address. Tip: If you enter the zip code first, City and State will be filled in automatically based on Zip Code and Country. See "Automatic Entry of City and State" page 40 for details.
State	The two-letter abbreviation for the state, such as PA or NY.
Zip	This is the 5- or 9-digit zip code, or the Canadian postal code. The "-" must be entered with the postal code if using the 9-digit code.
Country	The country of the individual's address. Note: If the Use Codes for Country Field option in the Entry Screen Parameters screen is checked, the Country field will appear as a list, and selecting a country other than the United States from the list will change the address fields to an international address format suitable for the selected country.
Address Type	The type of address that was entered for the donor. For example, home, vacation home, work, etc.
Email	The individual's email address.
Created Date	The date the record was first entered. This field is automatically filled in after the record is saved.
Last Modified	The date that the record was last updated and saved. This field is automatically filled in after the record is saved.
Modified By	The name of the last person to last update the record. This field is automatically filled in after the record is saved.
Title	Mr., Ms., Mr. & Mrs., Dr., etc. This prints on labels/letters as part of the full name (e.g., Mr. & Mrs. John Smith).
Suffix	Ph.D., MD, etc. This prints as part of the full name (e.g., John Smith, Ph.D.).
Do Not Send Mail	If selected, the record will not appear in mailing labels and merge letters. This is one way of handling deceased donors, for instance. This can be overridden when running mailings by selecting the Include "No Mail" Addresses option in the mail merge process.
Reason	These are the reasons a record has been set to not receive mail. If you've selected the Do Not Send Mail check box, choose a Reason.
Home Phone	The home phone number of the individual.
Bus. Phone	The business phone number of the individual.
Fax Phone	The fax number of the individual.

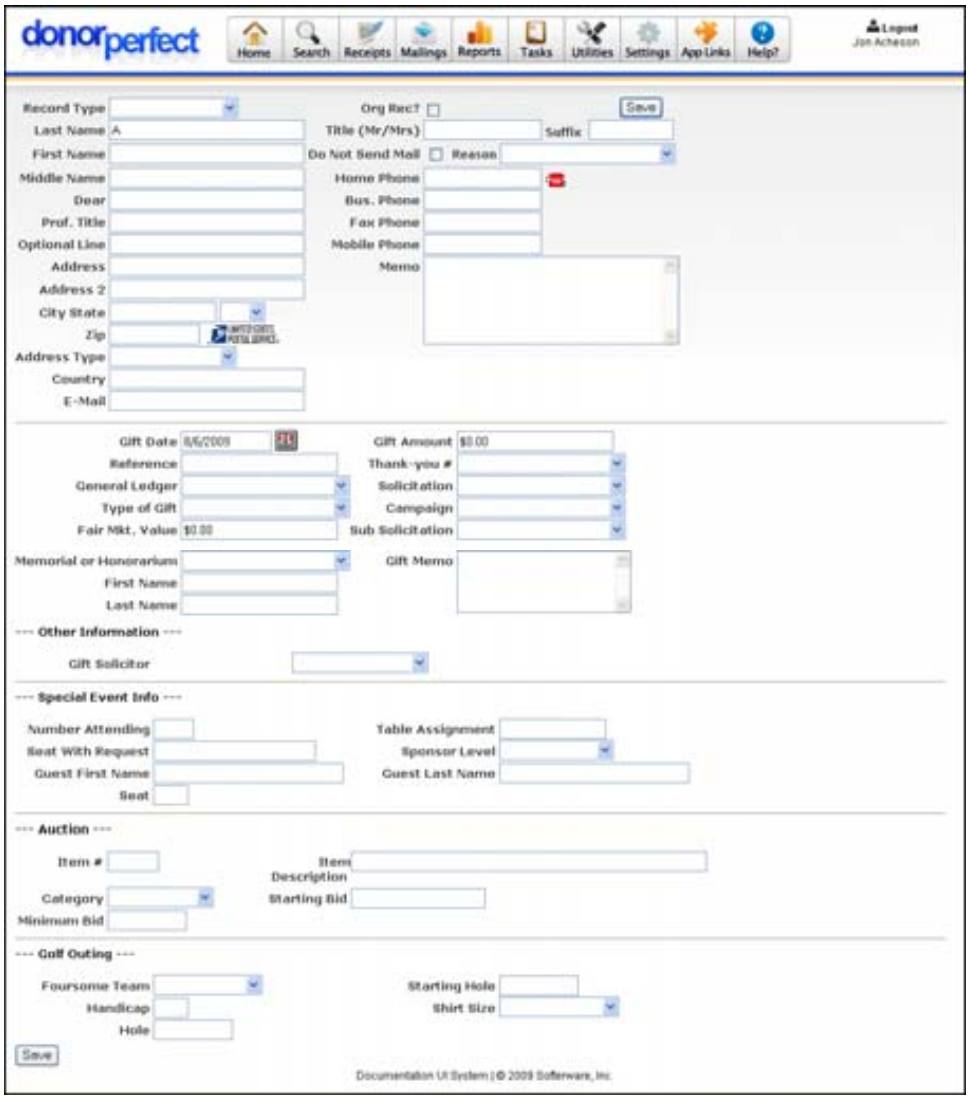
Field	Description
Mobile Phone	The mobile phone number of the individual.
Narrative	Any personal information you want to capture may be typed here. Clicking on opens a new window that provides a more open area to input comments. If you want to include a date for a note you enter in a memo field, click the **Insert date** button. Important! Do not use the ENTER key or quotation marks in this field. It will cause issues with exports.
Flags	This defines the relationship(s) between your organization and the constituent record. One record can have many flags. To select or change the flags associated with a record, click the **Edit Flags** button, make your changes, and then click the **Save** button. See Code Maintenance for details.

3. If desired, click the **Verify Address** button next to the address to instantly certify the constituent address. This button, located next to the **Zip Code** field, allows you to compare an address (or part of an address) against a national database helping ensure mailing accuracy. A new browser window will open, displaying a page where you can verify the address information.
4. Click the **Save** button to save the information entered into the screen.

Once you are done entering information and have saved your changes, you can either go to the Search screen to add another record to the system, or enter other data for this donor, such as gifts, pledges, tributes, or contacts.

Entering a Donor and a Gift at the Same Time

From the Search screen, you can add a new donor and a gift to the system in a single step. Just click the **Add Donor/Gift Button**, which will take you to a screen like the one below. Here, you will quickly be able to add new donors and their gift information on the same screen. Once you have entered all information, click **Save**, and you are ready for the next new donor!



Automatic Entry of City and State based on Zip Code and Country

DonorPerfect Online maintains a table of zipcodes (**DPZIPCODES**) that is used to automatically fill in city and state based on the zip code entered. It also provides similar functionality for the postal codes in use by Canada, Germany, Switzerland, Denmark and Spain.

This functionality works as follows:

1. When a zip code is entered, the program checks the Country field:

- If the **Country** field is blank, the system assumes the address is in the USA, and fills in **City** and **State** based on the listing in the **DPZIPCODES** table.
- If the **Country** field is filled in, the system matches the country and zip code and fills in the **City** and **State** fields. For countries that do not have an equivalent to states in their mailing addresses, the **State** field will remain blank.

2. If there is more than one city listed for the zip code, the software displays a new screen where you can select the city you want.

Entering or Editing Organization Records

▶ To enter or edit a record for an organization

1. In the Search screen, do one of the following:
   - Search for the record you want to edit and click on the record listing.
   - Search to make sure the record doesn't already exist, then click the **Add Organization** button.
2. In the Main Entry screen, enter or edit the following fields:

Field	Description
ID #	This is the client's ID number, which is automatically assigned after the record is saved.
Org Rec	Indicates whether this record is for an individual or an organization. This box is automatically checked if the record is for an organization or company.
Donor Type	Indicates whether the constituent is an Individual or Organization. An organization can also be listed as a Company, Foundation, Government, School or Vendor. These are functionally equivalent to an Organization, but help to identify the constituent more closely. A record can only have one type.
Org. Name	The name of the organization.
Org. Prefix	Articles that go before the actual name of the organization, such as "The."
Contact	The individual at the organization who your company primarily deals with.
Salutation	Use this field to create the desired salutation for the organization's contact person. For example, if you want to address Mr. Roger Sandstone as "Dear Roger" you would enter Roger in the Dear field.
Prof. Title	This is the professional title of the contact person for the organization.
Address	A street address, such as 132 Welsh Road, or 1600 Pennsylvania Avenue.
Address 2	This is an additional line below the address (for example, Apartment Number, Suite #, etc.).

Field	Description
City	The city of the mailing address. **Tip:** If you enter the zip code first, City and State will be filled in automatically. See "Automatic Entry of City and State based on Zip Code and Country" page 40 for details.
State	The two-letter abbreviation for the state, such as PA or NY.
Zip	This is the 5- or 9-digit zip code, or the Canadian postal code. The "-" must be entered with the postal code if using the 9-digit code.
Country	The country of the organization's address.
Address Type	The type of address that was entered. For example, home, vacation home, work, etc.
Email	The contact person's email address.
Created Date	The date the record was first entered. This field is automatically filled in after the record is saved.
Last Modified	The date that the record was last updated and saved. This field is automatically filled in after the record is saved.
Modified By	The name of the last person to last update the record. This field is automatically filled in after the record is saved.
Do Not Send Mail	If selected, the record will not appear in mailing labels and merge letters. This can be overridden when running mailings by selecting the Include "No Mail" Addresses option in the mail merge process.
Reason	These are the reasons a record has been set to not receive mail. If you've selected the Do Not Send Mail check box, choose a Reason.
Home Phone	This is the home phone number of the organization's contact person.
Bus. Phone	The business phone number of the organization.
Fax Phone	The fax number of the organization.
Mobile Phone	The mobile phone number of the contact person.
Narrative	Any personal information you want to capture may be typed here. Clicking on opens a new window that provides a more open area to input comments. If you want to include a date for a note you enter in a memo field, click the Insert date button. **Important!** Do not use the ENTER key or quotation marks in this field. It will cause issues with exports.

Field	Description
Flags	This defines the relationship(s) between your organization and the constituent record. One record can have many flags. To select or change the flags associated with a record, click the Edit Flags button, make your changes, and then click the Save button. See Code Maintenance for details.

3. If desired, click the **Verify Address** button next to the address to instantly certify the constituent address. This button, located next to the **Zip Code** field, allows you to compare an address (or part of an address) against a national database helping ensure mailing accuracy. A new browser window will open, displaying a page where you can verify the address information.
4. Click the **Save** button to save the information entered into the screen.

Once you are done entering information and have saved your changes, you can either go to the Search screen to add another record to the system, or enter other data for this donor, such as gifts, pledges, tributes, or contacts.

Gift Entry

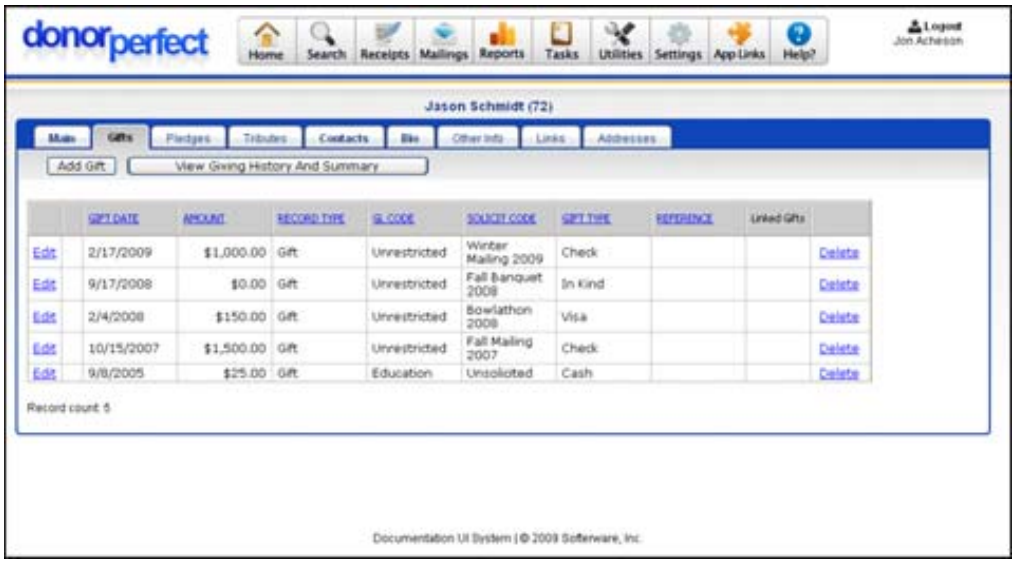
The Gifts section of DonorPerfect is used to record various types of gifts including cash, check, stock, in-kind, matching, and tribute gifts (a gift in honor of or in memory of another person). You can also record soft credits for donors who are to be recognized for their part in generating contributions.

Note: A donor's giving history can be entered in any order. DonorPerfect will automatically sort each entry in reverse chronological order (newest to oldest) for display and reporting purposes.

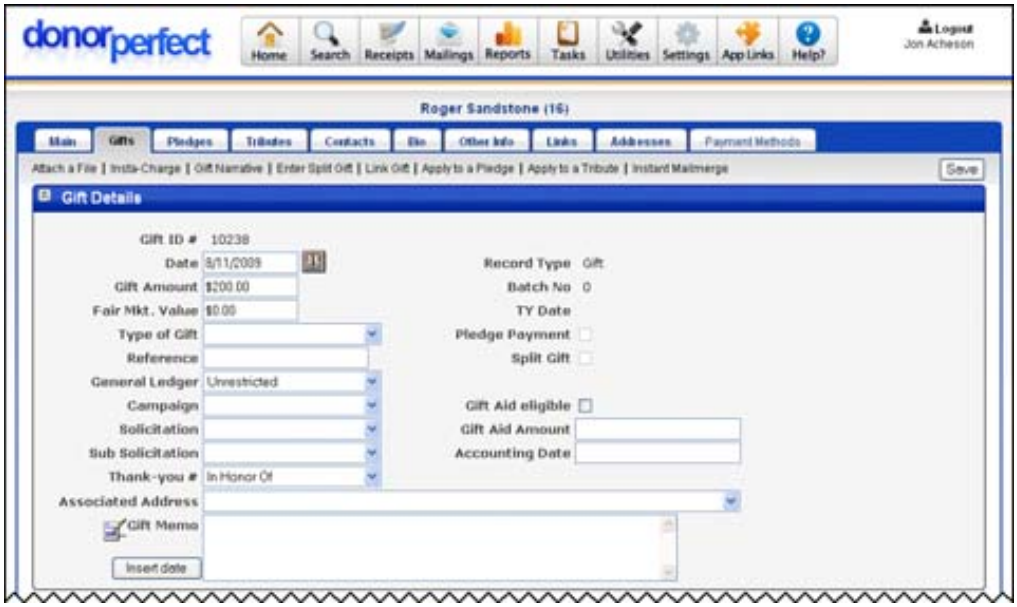
Entering Gifts

▶ To enter gifts

1. Select a donor using the Search screen (see page 27).
2. Click the **Gifts** tab in the Main Entry Screen. The Gift List screen appears.



3. To add a new gift, click the **Add Gift** button. The Gift Entry Screen appears.



4. Use the **TAB** key to move from field to field or click on the desired field. See "Gift Entry Screen," page 47 for details on the fields in the Gift Entry Screen.
5. When finished, click **Save** to save the information you entered.

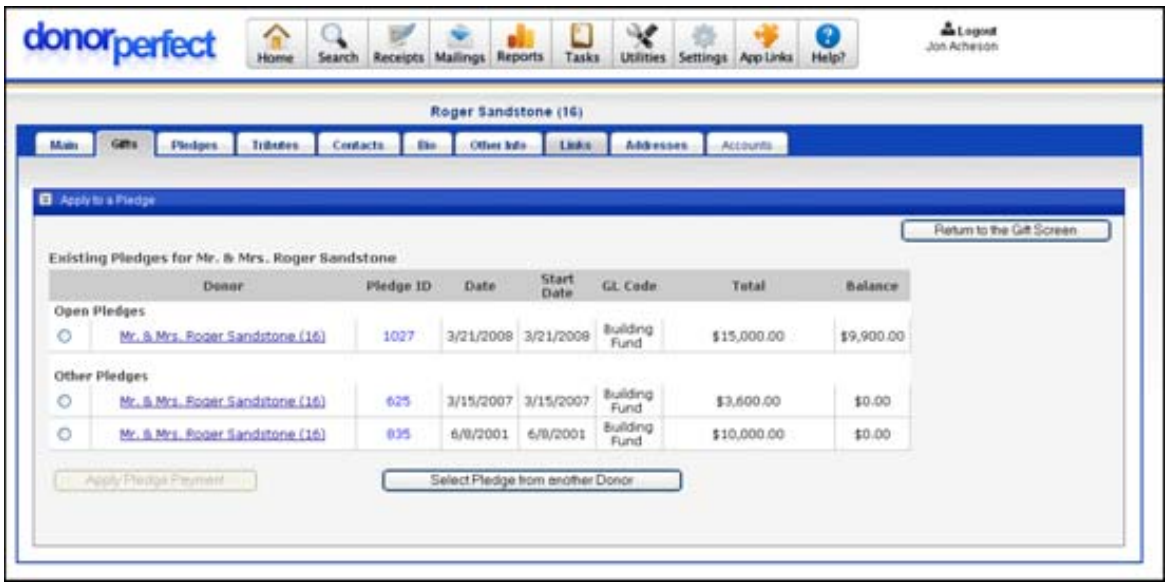
Once a new gift is saved, if there are no outstanding pledges for the donor, you will be returned to the Gift List screen. An entry for the new gift will appear in the screen.

If the donor has any outstanding pledges in the system, the system will prompt you to apply the gift towards one of the pledges.

Prompt to Apply a Gift to an Outstanding Pledge

If the donor has any open pledges in the system, when you add a new gift you will automatically see the following message:

Clicking the **No** button will take you back to the Gift List screen. Clicking on the **Yes** button will take you to the Apply Gift to a Pledge Screen. This screen allows you to immediately apply the gift towards one of the outstanding pledges.

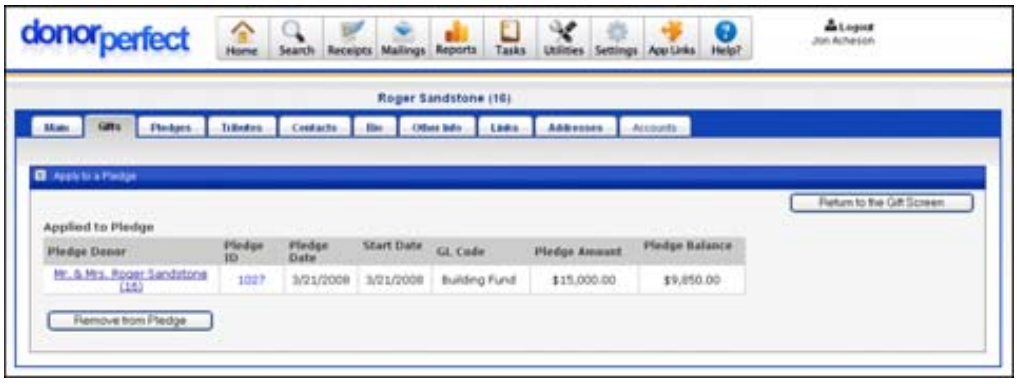


▶ To exit the screen without applying the gift to a pledge

1. Click one of the following links to exit the screen without applying the gift towards an open pledge:
   - Click **Return to the Gift Screen** to return to the Gift Entry Screen.
   - Click on the **Donor Name** for a pledge to go to the Main Entry Screen for that donor.
   - Click on the **Pledge ID** number for a pledge to go to the Pledge Entry Screen for that pledge.

▶ To apply the gift towards a pledge

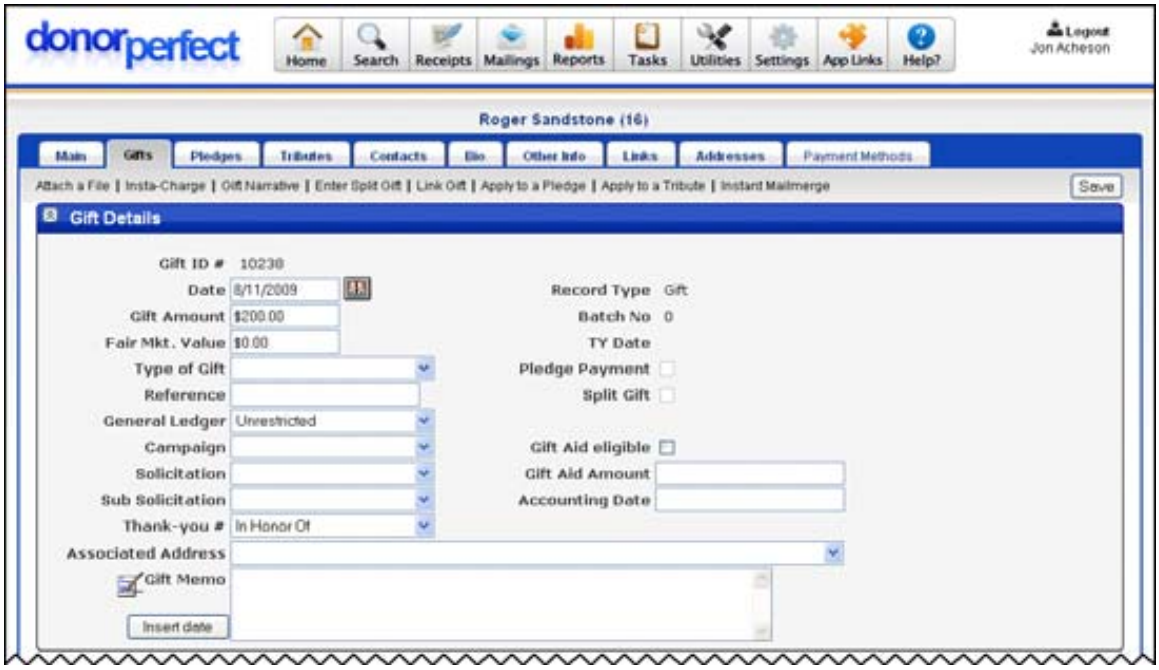
1. Select the pledge by clicking on the option button to the left of the pledge listing.
2. Click the **Apply to Pledge** button. You will now see a slightly modified view with the gift applied to the pledge.



3. Click **Return to the Gift Screen** to return to the Gift Entry screen.

Gift Entry Screen

The **Gift Entry Screen**, like all other DonorPerfect entry screens, can be modified to meet your organization's individual needs. Therefore, the figure shown below may not match the layout used by your organization.



You can complete any of the following information for gifts:

Field	Description
Gift ID #	This is a unique number that is assigned to each gift. If your receipts must print a unique number, you can use this field (gidnumb) to print on the receipt.
Batch No	The batch number is automatically assigned when the batch is processed. For details, see the "Acknowledgements/Receipts" section on page 91.
Gift Date	This is the date the gift is entered. The default is today's date, but you can change this.
Reference	This is the reference field used to store data relevant to the transaction. The most common use is for tracking check numbers.
Gift Amount	This is the amount of the contribution.
Thank-you #	Select the acknowledgement letter to be sent to the donor for the gift.
General Ledger	This field is used to track the fund or general ledger account to which the gift will be credited. See Appendix B for examples of General Ledger codes.
Solicitation	This field tells what solicitation or media is responsible for generating the gift. See Appendix B for examples of Solicitation codes.
Type of Gift	The gift type field is used to record the form of the gift such as cash, in-kind, stock, etc. See Appendix B for examples of Gift Types.

Field	Description
Campaign	This optional field can be automatically filled based on the entry for Solicitation Code or General Ledger fields. For instance, if there is an annual campaign code of AN06 made up of 3 different solicitations, you can set up the campaign field to automatically fill with AN06 whenever one of those solicitation codes is used for a gift. For more information on how to set this up the "Code Maintenance" section on page 305.
Fair Market Value	The Fair Market Value field is used for tracking the non-deductible portion of a contribution. This is used for events where a part of the donation is not tax deductible, or if goods and services are being received in exchange for the gift. This field is also used for tracking the value of an in-kind gift. Money entered here is for display purposes only; it does not show in financial reports and does not affect the donor's giving totals. The Fair Market Value is displayed (and subtracted from total giving) in the End-of-Year report that shows annual giving for tax purposes.
Sub-Solicitation	This field further differentiates the solicitation method. For instance, the solicitation code may show that the gift is for the annual dinner. The sub-solicitation is used for coding the purpose of the gift such as sponsorship, table purchase, auction item donation, etc. See Appendix B for examples of Sub-Solicitation codes.
Pledge Payment	Pledge payments are entered from the Pledge Screen through Apply Payment. This box is automatically checked and indicates the gift is a pledge payment. For details on how to apply pledge payments, see page 64.
Associated Address	To associate a secondary address with the gift, select the proper address from the Associated Address pull-down. If the address is marked as NO MAIL, then no acknowledgement letters will be sent. The main address is noted with the word MAIN written to the left side of the address.
Memorial or Honorarium	This field allows you to track whether or not a gift was made in Memory or in Honor of another individual.
First Name, Last Name	These fields document the person for whom the gift is in honor or memory of. Also used for tracking names of guests for events.
	Note: The Memorial or Honorarium, First Name, and Last Name fields only apply to historical gifts. If you want to enter a gift given in memory of or in honor of an individual, you should use a tribute. See page 65 for more information on how to set up a tribute. If you already have a tribute set up and you want to apply a gift to it, see page 54.
Gift Memo	The memo may hold an in-kind gift description, special instructions for processing the gift, or other information regarding the gift. Clicking on opens a new window that provides a more open area to input comments. If you want to include a date for a note you enter in the Memo field, click the Insert date button.
Receipt Information	If you've set up your system to assign receipt numbers to gifts (see page 92 for details), the Receipt Number, Receipt Date, and Receipt Status fields are completed after you create the acknowledgement file. You can edit these fields if necessary by clicking the Edit button. For details on creating the acknowledgement file, see page 91.

Note: When adding new gifts, default values may appear in some fields when you first enter the Gift Entry Screen. Default values are set through Utilities, Defaults. See page 361 for more details.

Attach a File

The **Attach a File** link at the top of the Gift Entry Screen allows you to attach a file to the gift record using the Hosted File Storage feature. See "Hosted File Storage" on page 318 for details.

Gift Narrative

Clicking on the **Gift Narrative** link opens the **Gift Memo** field up in a new form where it can be more easily edited. Click the **Insert today's Date** button to insert the current date into the text at the top of the field. Click the **Save** button to close the form and return to the Main Entry Screen.

Edit a Gift

▶ To edit a gift entry

1. To access an existing record, click the **Edit** link next to the desired record.

Delete a Gift

▶ To delete a gift

1. Click the **Gifts** submenu. The **Gift List screen** appears.
2. Next to the gift record you want to delete, click the **Delete** link. The following message appears: **Are you sure you want to delete this record?**
3. Click **OK** to confirm the deletion.

Split Gifts

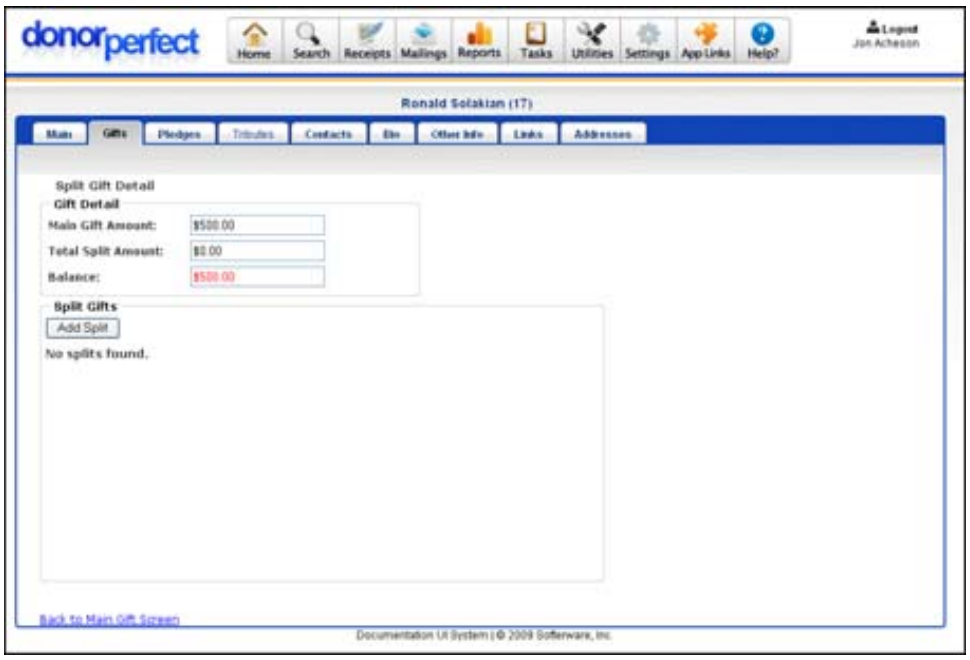
A Split Gift is a donation that is given as one lump sum, but is intended to be applied to more than one pledge, solicitation or other purpose. For instance, a donor might donate $100 to be applied towards a $50 pledge, with the remainder going into the general fund.

To handle this, we create a gift entry for the total amount of the donation, and then use split gift entries to subdivide it.

Entering Split Gifts

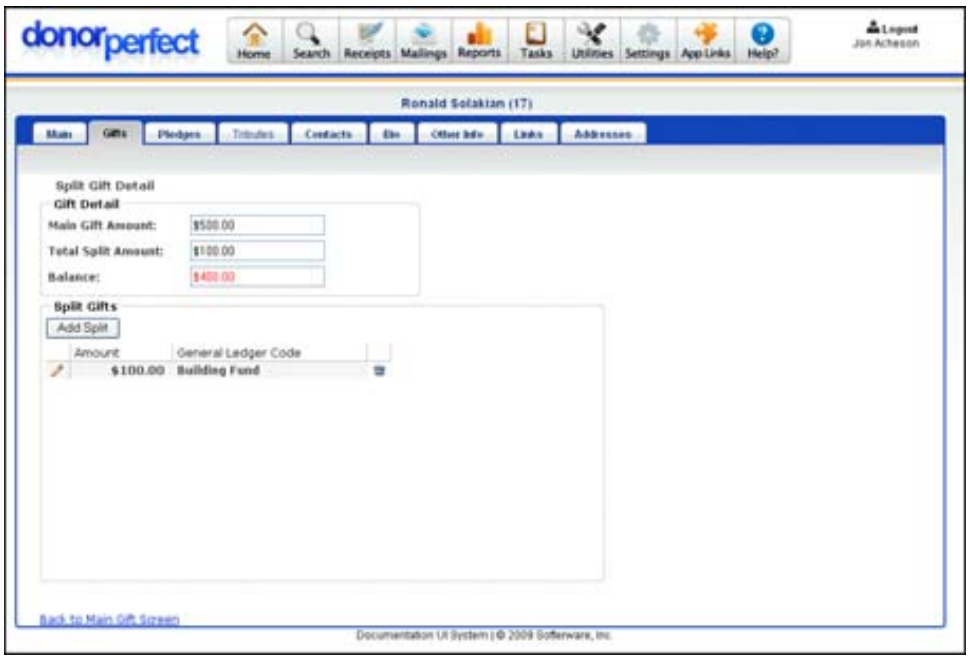
▶ To enter a split gift

1. From the **Gift List Screen** click the **Add Gift** button to add a new gift. To access an existing record, click **Edit** next to the desired record.
2. Enter the full amount of the gift on the **Gift Entry Screen**.
3. Click the **Enter Split Gift** link at the top of the page. The **Split Gift Screen** appears.

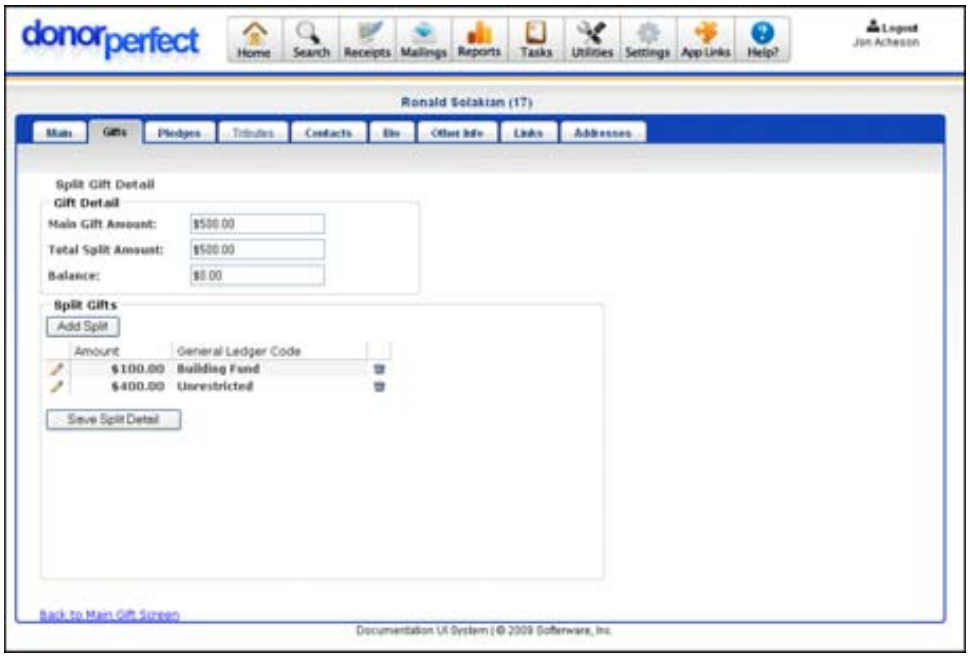


4. Click the **Add Split** button. A set of split information fields appears.

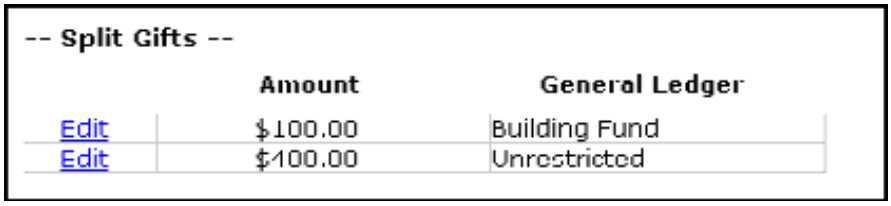
5. Enter the amount of the new split, along with the GL Code and other information.
6. Click **Save**. The split is created, and the amount is automatically deducted from the main gift balance.



7. Repeat steps 4-7 for each additional split until the **Total Split Amount** equals the **Main Gift Amount**. The **Save Split Detail** button will appear:



8. Click the **Save Split Detail** button. You are returned to the Main Gift Screen, which now displays the split information towards the bottom of the screen.



Linking a Name to a Gift

The Link Name to Gift screen allows you to link another donor record to the current gift as a Soft Credit, Notification, or Matching Gift Link.

Adding a soft credit, notification or matching gift does not affect the amount credited to the original donor of the gift.

Note: Pledge Payment gifts cannot be linked.

What is a Soft Credit?

A *soft credit* recognizes a donor who is instrumental in influencing other donors to give to your organization. It measures the value of donations that were given by other people or institutions due to that person's influence. It is not used for direct donations by a person, only for situations where a person assisted your organization by getting others to contribute.

Adding a soft credit to a gift will create a Soft Credit entry in the influential person's giving history. The amount does not affect the person's giving totals unless you change the system parameters to include linked gifts in calculated fields (see "Calculated Field Parameters" page 388 for details).

What is a Notification?

A *notification* generates an acknowledgement letter to someone other than the donor. For instance, if a gift was given as a tribute to a person, a letter can be generated for that person notifying them of the tribute. Adding a notification to a gift will create a Notification Letter entry in the linked person's giving history.

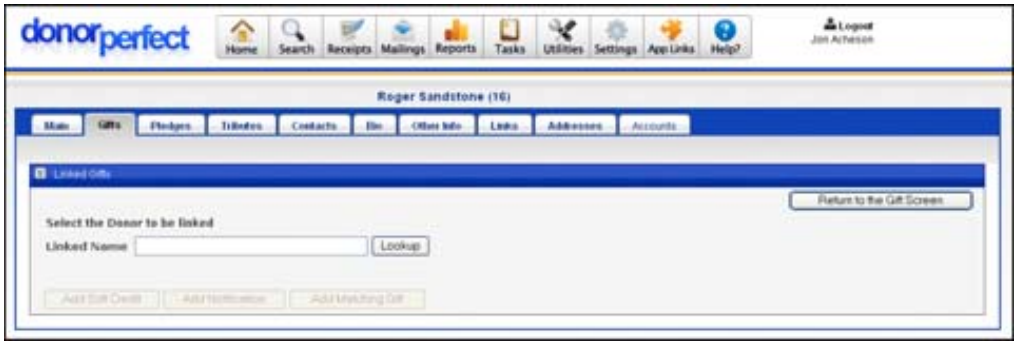
What is a Matching Gift?

A matching gift is an amount of money given to match or supplement someone else's donation, usually made by an employer to match an employee's contribution. Adding a matching gift will generate a pledge transaction for the matching gift record.

Adding A Soft Credit, Notification, or Matching Gift

▶ To add a soft credit, notification, or matching gift to a gift

1. To access the screen, click the **Link Gift** link at the top of the Gift Entry screen.



2. Look up the name of the constituent you want to link to the gift:

   a. Click the **Lookup** button next to the **Linked Name** field. The Lookup Name screen opens.

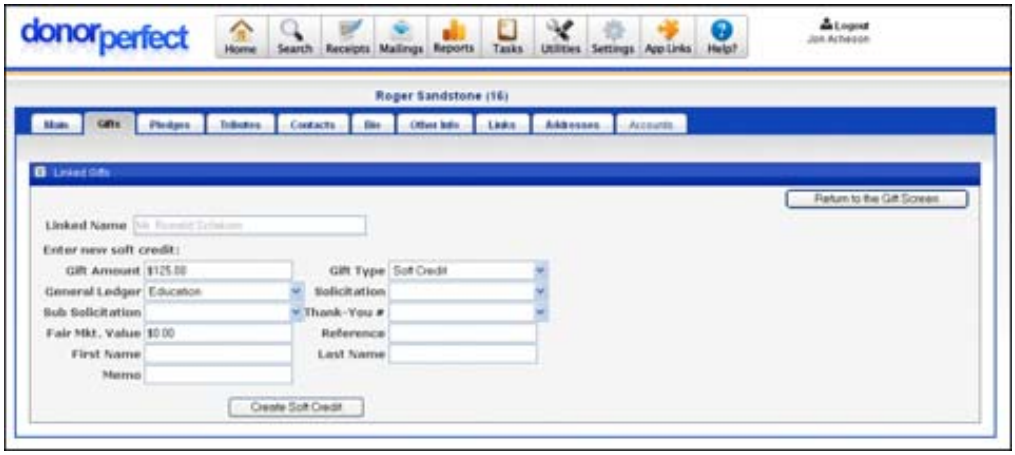
   b. Fill in as many of the fields as are needed to find a match to the person you want to link to the gift, and click the **Lookup** button. A list of donors matching the information you entered appears at the bottom of the Lookup Name screen.

   c. Click on the name of the person you want to link to the gift. The Lookup Name screen closes, and the name appears in the Linked Name field on the Linked Gift screen.

3. Click on one of the following buttons:

   - Click the **Add Soft Credit** button to add a soft credit.
   - Click the **Add Notification** button to add a notification.
   - Click the **Add Matching Gift** button to add a matching gift.

   A new set of fields appear at the bottom of the screen.



4. If desired, you can enter information into the various fields. They are identical to the fields in the regular gift entry screen. This information will appear in the gift entry.
5. When finished entering information, click the **Create Soft Credit**, **Create Notification**, or **Create Matching Gift** button. You will be returned to the Gift Entry screen. The link will be reflected in the gift entry on the Gift List screen.

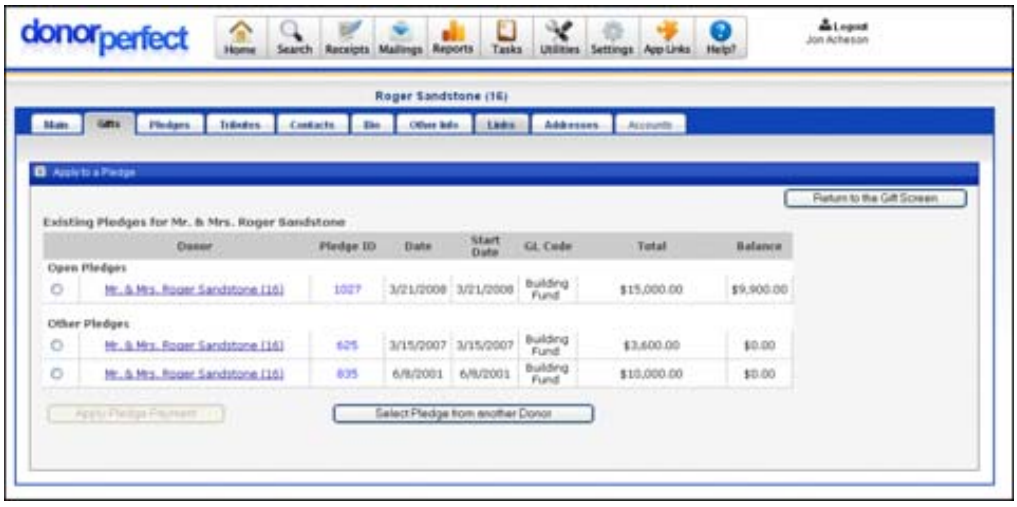
Applying a Gift to a Pledge

A pledge is a promise of a gift to be given at a later date or over a specified period of time. After you have set up a pledge, you can add existing gifts to that pledge in order to fulfill it. (See "Pledge Entries" page 59 for details on setting up pledges.)

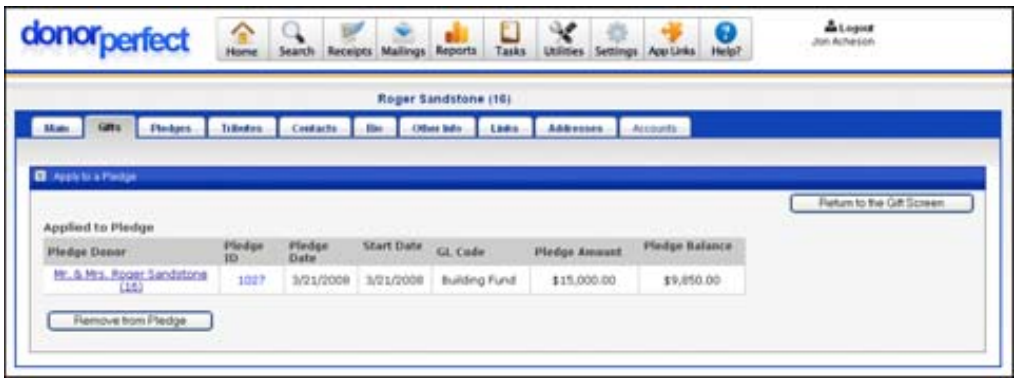
Note: If you are adding a new pledge payment, it is inefficient to create it as a gift and add it to the pledge. Instead, you should create it as a pledge payment, which will automatically create a gift entry and populate it with the correct information. If you created the payment as a gift first, you would have to enter all of that information by hand. See "Applying a Pledge Payment" page 64 for details.

▶ To apply a gift to a pledge

1. Click the **Edit** link next to the gift entry in the Gift List screen. This reopens the gift in the Gift Entry Screen so that you can edit the settings.
2. In the Gift Entry Screen, click **Apply to a Pledge**. This opens the Apply Gift to a Pledge Screen.



3. Select the pledge by clicking on the option button to the left of the pledge listing.
4. Click the **Apply Pledge Payment** button. You will now see a slightly modified view with the gift applied to the pledge.

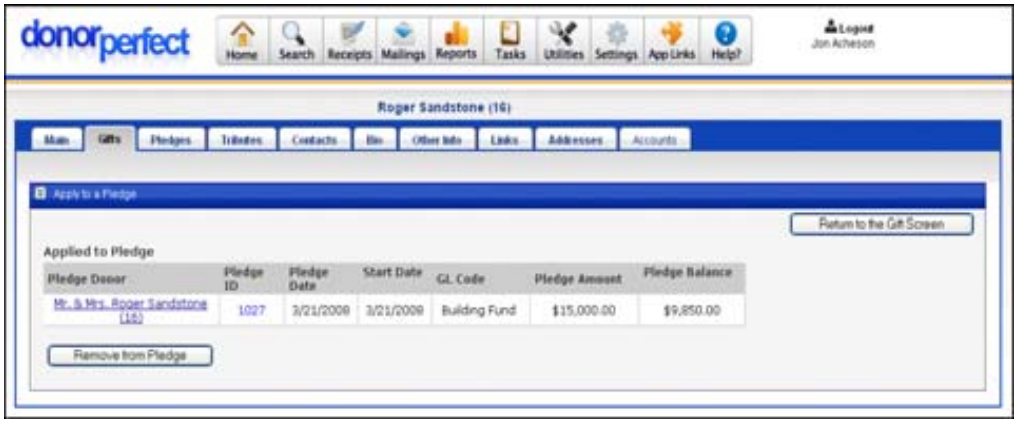


5. Click the **Return to the Gift Screen** button to return to the Gift Entry screen.

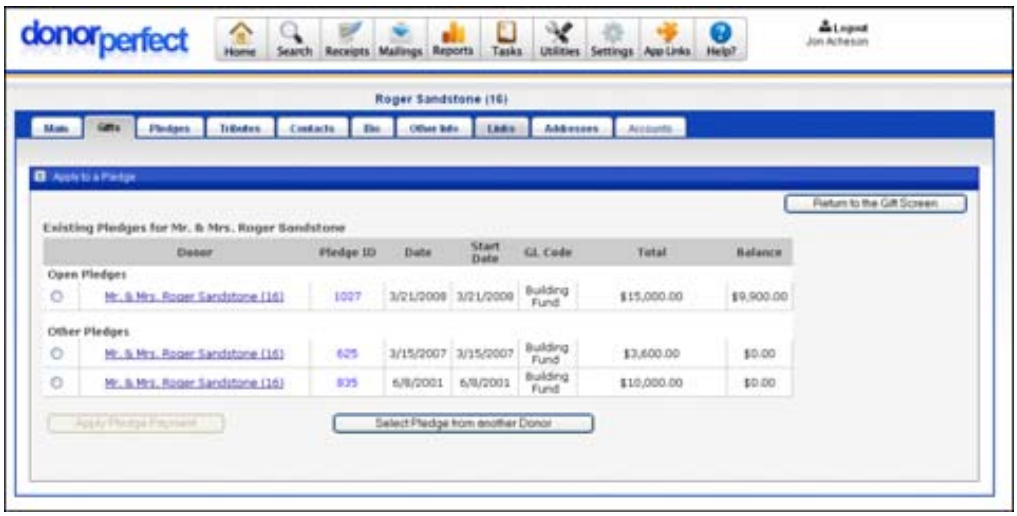
Removing a Gift from a Pledge

▶ To remove a gift from a pledge

1. Click the **Edit** link next to the gift entry in the Gift List screen. This reopens the gift in the Gift Entry Screen so that you can edit the settings.
2. In the Gift Entry Screen, click **Apply to a Pledge**. This opens the Apply Gift to a Pledge Screen.



3. Click the **Remove from Pledge** button. The Apply Gift to a Pledge screen goes back to its "not applied to a pledge" layout.



4. Click **Return to Gift Screen** to return to the Gift Entry Screen.

Applying a Gift to a Tribute

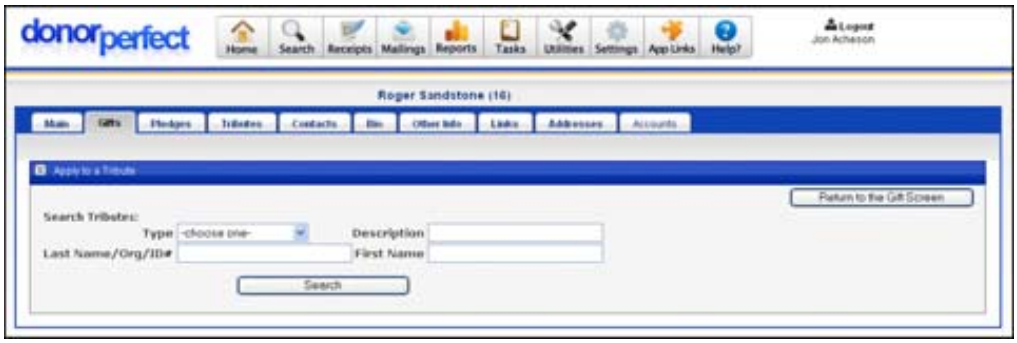
A tribute is an entry associated with a donor that is used to track memorial or honorarium gifts. After you've set up a tribute (see page 65 for details on how to do this), you have the option to apply a gift to a tribute.

When you go into a gift record that has been applied to a tribute, you can view the tribute details at the bottom of the Gift Entry screen.

When acknowledgement letters are created for gifts related to a tribute, the tribute details, including the Main Contact and Description, are included in the acknowledgement letter mail merge data file. For details on the acknowledgement process, see page 91.

▶ To apply a gift to a tribute

1. From the **Gift Entry** screen, click the **Apply to a Tribute** link at the top of the screen. The following screen appears:

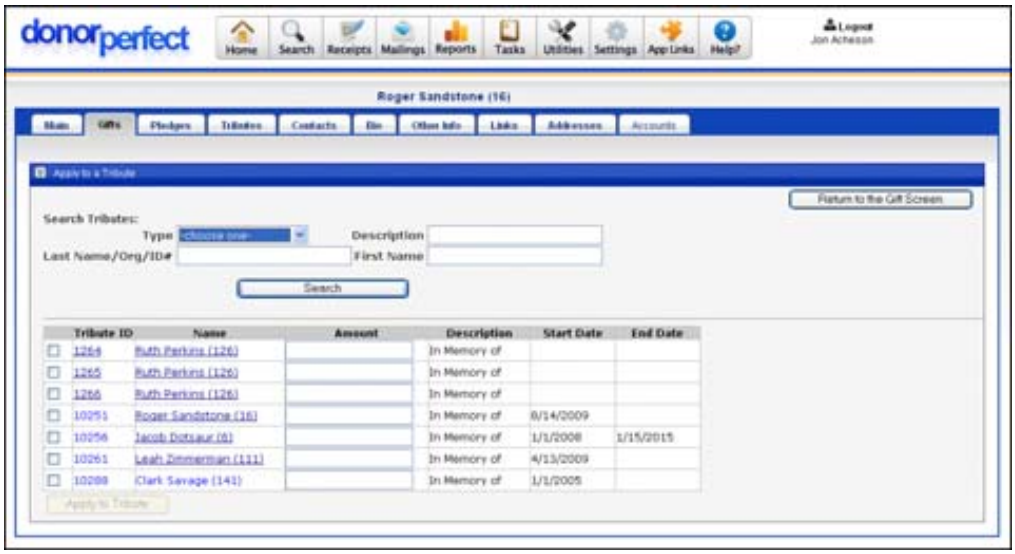


2. Set the following search criteria:

Criteria	Description
Type	The type of tribute you want to find (In Honor Of or In Memory Of). To search all tributes, set Type to -choose one-.

Criteria	Description
Last Name, Org, ID#	The last name, organization name, or ID number of the constituent who is the contact for the tribute.
Description	The description of the tribute (In Memory of or In Honor Of).
First Name	The first name of the constituent.

3. Click the **Search** button. The tributes that match the criteria you entered are displayed below the fields.



For each tribute, the **Tribute ID**, **Name** (of owner), **Amount**, **Description**, **Start Date**, and **End Date** appear.

Note: Only active tributes appear.

4. Select the tributes that you want to apply the gift to by checking the appropriate checkboxes.

Note: Gifts can be applied to multiple tributes owned by multiple donors.

5. In the **Amount** column for each tribute, verify that the gift amount is correct. If necessary, you can change this value.
6. Click the **Save and Close** button.

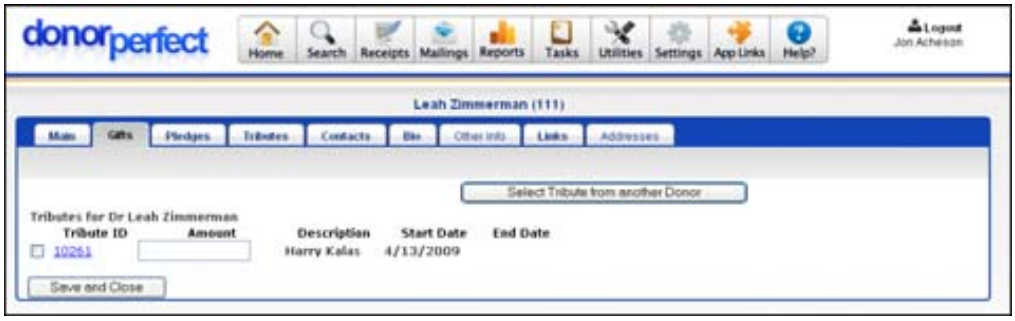
   You will automatically be prompted to add a notification to the system:

7. Do one of the following:
   - Click the **Yes** button to create a notification for this gift. See "Linking a Name to a Gift" page 52 for details on notifications.
   - Click **No** to finish processing the gift and tribute, and return to the Gift List screen.

Remove a Gift from a Tribute

▶ To remove a gift from a tribute

1. Click the **Edit** link next to the gift entry in the Gift List screen. This reopens the gift in the Gift Entry screen so that you can edit the settings.
2. In the Gift Entry screen, click the **Apply to a Tribute** link. This reopens the Apply Gift to a Tribute screen.



3. Clear the check boxes next to the tributes you want to remove the gift from.
4. Click the **Save and Close** button.

Exporting a Mail Merge File for a Thank You Letter

You can export a mail merge file for a thank you letter directly from the Gift Entry Screen. This feature generates a **.csv** format mail merge data file from the donor and gift information that you can open in Excel or save to your computer.

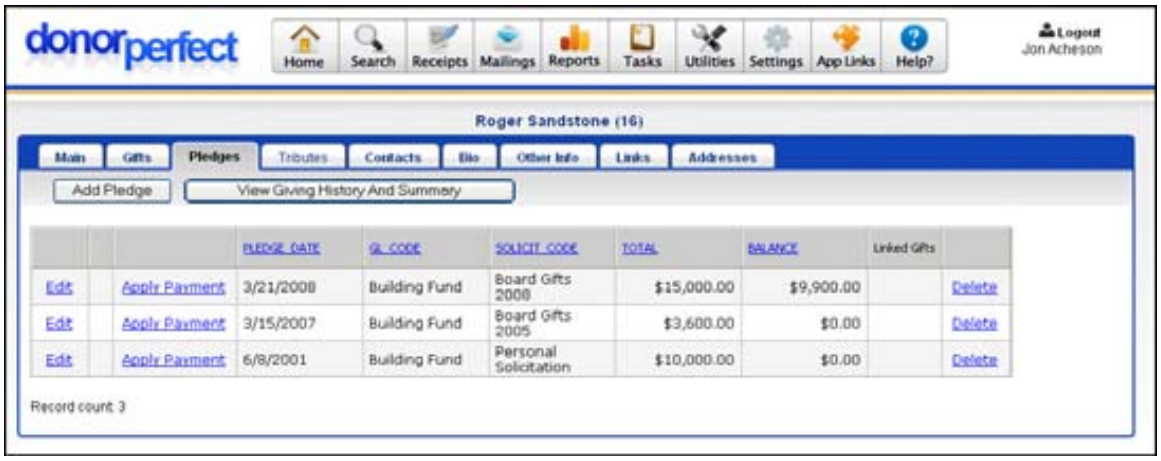
▶ To export a mail merge file from the Gift Entry Screen

1. In the Gift Entry Screen, find the **Export Options** section at the bottom of the screen.

2. Select the financial export template that you want to use from the list. (For more information about export templates, and how to make them, see "Export Templates" on page 362.)
3. To include pledge data in the mail merge file, check **Include Pledge Data for Pledge Payments**. The following fields will be populated with pledge data, if they exist in the export template:
   - **BALANCE**
   - **BILL**
   - **DELINQUENT**
   - **FREQUENCY**
   - **TOTAL**
4. Click the **Export to Excel** button. You will be prompted to either open the **.csv** file in Excel, or save it to your computer.

Pledge Entries

A pledge is a promise of a gift to be given at a later date or over a specified period of time. DonorPerfect Online has the ability to monitor the pledge balance, print reminder letters, and track overdue pledges.



Adding Pledges

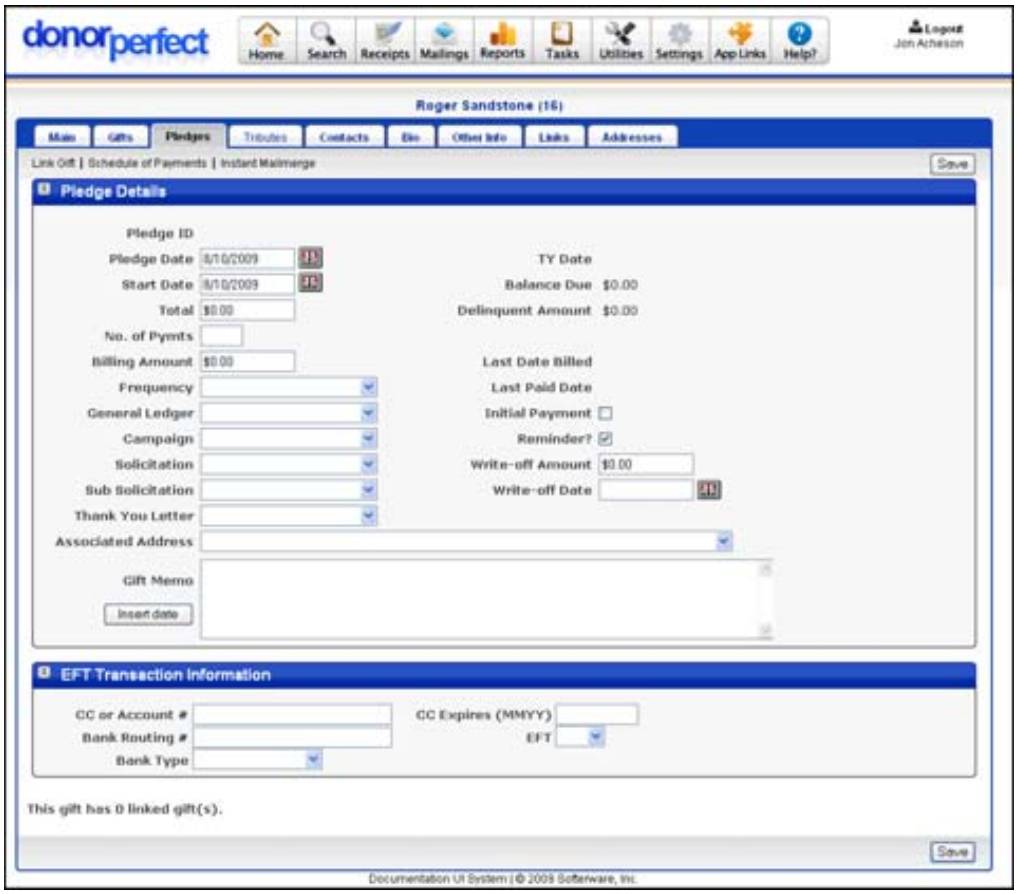
▶ To add a pledge

1. Select a donor using the Search screen (see page 27).
2. Click the **Pledges** tab in the Main Entry Screen. The Pledge List screen appears.
3. To add a new pledge, click the **Add Pledge** button. To access an existing pledge, click the **Edit** link next to desired record**.** The **Pledge Entry Screen** appears.

4. Use the TAB key to move from field to field or click on the desired field. Click **Save** (either at the top or bottom of the screen) to save the information entered when done.

Pledge Entry Screen

The **Pledge Entry Screen** like all other screens in DonorPerfect, can be modified to meet the needs of each specific organization; therefore, the figure shown below and the field descriptions may not match the format for your organization.



Pledge Entry Screen Field Descriptions

You can enter any of the following information for pledges:

Pledge ID	A pledge identification number is automatically assigned to all pledges.
Pledge Date	This is the date the pledge was made by the donor.
Start Date	This is the date the donor will start making payments on their pledge.
Total	This is the total pledge amount. If the pledge has an indefinite ending period (e.g., $10 a month forever), enter 0.
No. of Payments	The total number of payments to be scheduled. When a number is entered into this field, the Billing Amount field fills in automatically.

Billing Amount	The amount to be invoiced for each billing cycle. This field is populated automatically if the Number of Payments field is filled in.
Frequency	The value shown in this field will determine the frequency the pledge is to be billed.
Reminder?	If checked, reminders will be generated during Pledge Processing. For more details on reminders, see page 302.
General Ledger	This is the fund (or general ledger account) that will be credited for the gift. See Appendix B for examples of General Ledger codes.
Solicitation	This field tells what solicitation or media is responsible for generating the gift. See Appendix B for examples of solicitation codes.
Initial Payment	The initial payment should be checked if a portion of the pledge is paid at the same time the pledge is made.
Write-off Amount	If a portion of the total is not going to be paid, enter the amount to be written off. The pledge balance is then lowered to the total minus payments minus the write-off amount.
Associated Address	Select the address the pledge should be associated with. Each address from the Addresses Screen will be present, as well as the main address. If no address is selected, the default will be the main address.
Schedule of Payments	Select the Schedule of Payments option when a donor is to be billed on an Unusual Payment Schedule. You must set the Frequency to Unusual Payment Schedule for this option to be available. See the next section for details.

The following fields are automatically updated (grayed out and no entry is required):

- **Balance Due:** The total pledge amount minus payments. Updated each time a pledge gift is entered through Apply Payment.
- **Delinquent Amount:** The total amount billed (to date) minus payments. Updated each time a pledge gift is entered through Apply Payment and each time reminders are run. For details, see the "Running Monthly Pledge Reminders" on page 302 for more details.
- **Last Paid Date:** This field is updated each time a pledge gift is entered through Apply Payment.
- **Last Date Billed:** This field is updated each time pledge reminders are run.

The following fields are used to process EFT transactions if the CheckFree version of EFT is used:

- **CC or Account #:** This is the Credit Card # or the Bank Account #. The Credit Card # should be entered without dashes or spaces. EFT will perform a validation check to ensure that it is a potentially valid card. The length of the credit card will vary as follows:

Visa	13 or 16	Amex	15
MasterCard	16	Discover	16

- **CC Expires (MMYY):** This is the expiration date of the credit card. A date of October 5, 2005 or 10/5 must be entered as 1005.

- **Bank Routing #:** This is a nine-digit number that identifies the bank. Also called ABA number, it can be found on the check in the lower left corner. EFT will perform a validation on the number to ensure that your entry is valid.
- **EFT:** Choose **Yes** or **No**. This determines whether this transaction will be processed using EFT or not.
- **Bank Type** This determines whether it is a checking or savings account.

> Note: When adding new gifts, default values may appear in some fields when you first enter the Pledge Entry Screen. Default values are set though Utilities, Defaults. See page 361 for more details.

The following fields are used to process EFT transactions if the SofterWare Gateway version of EZ-EFT is used:

- **EFT:** Choose Yes or No. This determines whether this transaction will be processed using EFT or not.
- **Category:**

Attach a File

The **Attach a File** link at the top of the Pledge Entry Screen allows you to attach a file to the pledge record using the Hosted File Storage feature. See "Hosted File Storage" on page 318 for details.

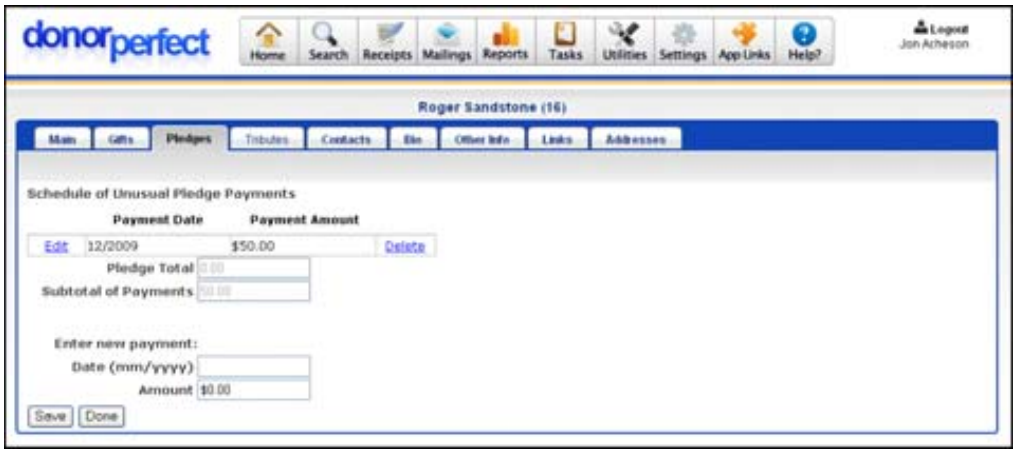
Entering an Unusual Payment Schedule

If a donor does not want to pay on a regularly scheduled basis (weekly, monthly, yearly, etc.), you may enter an Unusual Payment Schedule for that pledge. This option can be any set of dates on which a donor chooses to make their pledge payments, therefore, allowing great flexibility in pledge payment schedules.

▶ To enter an unusual payment schedule

1. On the Pledge Entry Screen, choose **Unusual Payment Schedule** from the **Frequency** pull-down.
2. Click the **Schedule of Payments** link at the top of the screen. The Schedule of Unusual Pledge Payments screen appears.

3. In the **Enter new payment** section, enter the **Date** and **Amount**, and click the **Save** button. An entry for the new payment appears at the top of the screen.



4. Repeat until you have finished entering all scheduled payments.
5. Click the **Done** button. You will be returned to the Pledge Entry screen.

Editing a Pledge

▶ To edit a pledge entry

1. To edit an existing pledge record, click the **Edit** link next to the record in the Pledge List Screen. The Pledge Entry screen will reopen, allowing you to edit the settings for the pledge.

When you finish editing the pledge settings, click the **Save** button to save your changes and return to the Pledge List Screen.

Deleting a Pledge

▶ To Delete a Pledge

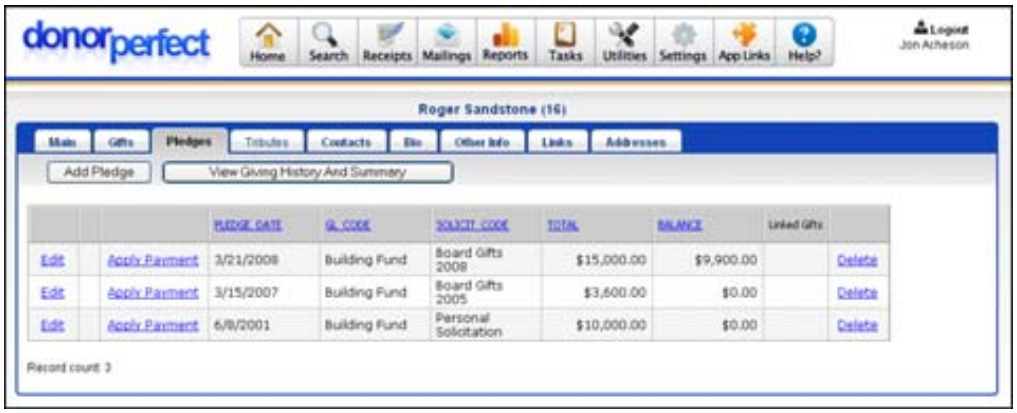
1. From the Main Screen, click on **Pledges**. The Pledge List screen appears.
2. Click the **Delete** link next to desired pledge.

   The following message appears: **Are you sure you want to delete this record?**
3. Click **OK** to confirm.

Applying a Pledge Payment

The **Apply Payment** links on the Pledge List screen automatically create a gift payment record that will lower the pledge balance. The amount is based on the Billing Amount.

1. Click the **Pledges** tab in the Main Entry Screen. The Pledge List screen appears.



2. Next to the desired pledge, click the **Apply Payment** link. The **Gift Entry Screen** appears.
3. Enter the gift information. The **General Ledger** and **Solicitation** fields are automatically filled in with information entered during pledge entry. The default **Amount** is based on the pledge's **Billing Amount**.
4. Use the **TAB** key to move from field to field or click on the desired field. Click **Save** to save the information entered when done.

Pledges with Indefinite Ending Dates

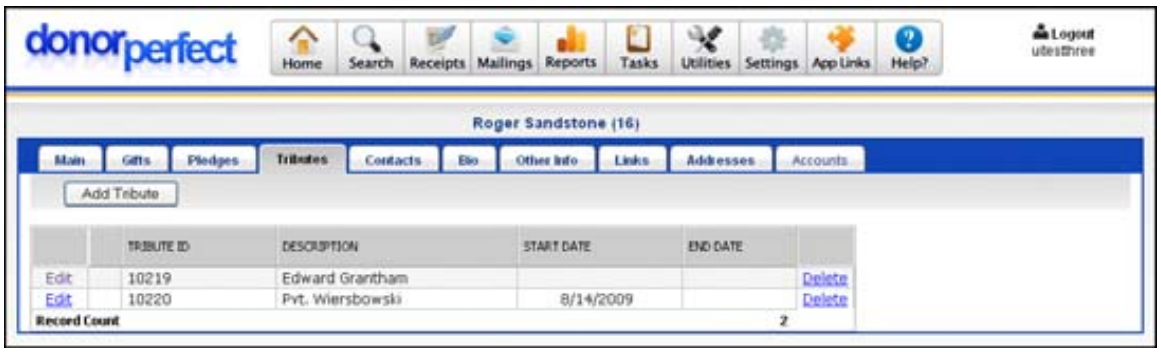
This applies to pledges that have no definite time period. For example, there might be a donor who asks you to bill them monthly until they instruct you to stop. To create an indefinite pledge, enter the following in the **Pledge Entry Screen**:

Total:	0
Billing Amount:	amount to be invoiced for each billing cycle
Frequency:	the frequency of each billing cycle

The balance will remain at 0.00 but the delinquent amount will update as payments are made in response to pledge reminders.

Tribute Entry

Tributes allow you to track gifts given in memory of or in honor of an individual. Instead of having to enter the memorial or honorarium information in multiple gift records, you can create one tribute record and then apply as many gifts to that tribute as you want.

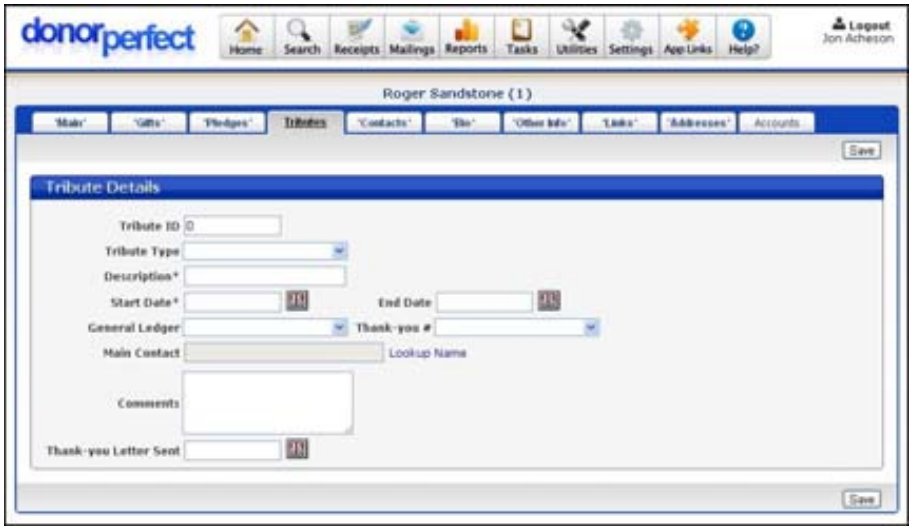


Adding a Tribute

You can add an unlimited number of tributes to any donor.

▶ To add a tribute

1. Select a donor using the Search screen (see page 27).
2. Click the **Tributes** tab in the Main Entry Screen. The Tributes screen appears, showing any existing tributes for a donor.
3. Click the **Add Tribute** button. The **Tribute Details** screen appears.



4. Enter the following information for the tribute:

Tribute Type	The type of the tribute (e.g., *In Honor Of* or *In Memory Of*).
Description	The name of the person who is being paid tribute to. If a tribute is in memory of Abraham Lincoln, enter Abraham Lincoln here.
Start Date/End Date	The time frame in which this tribute can accept gifts. As long as the tribute has not expired, gifts can be applied. You must enter a Start Date in order to apply a gift, but you can leave the tribute open ended by leaving the End Date field blank.
General Ledger	The default GL code for gifts applied to this tribute.

Thank-you #	The acknowledgement letter for gifts applied to this tribute.
Main Contact	Another donor who is the contact for any gifts related to this tribute. For example, if the tribute is in memory of Roger Sandstone, you can designate his wife Mary as the main contact. If this field is blank, the donor you're adding the tribute to is the owner of the tribute.
Comments	Any information you want to keep track of for this tribute. For example, if the person you want to designate as the contact for this tribute is not in your DonorPerfect database, enter the contact information here.
Thank-you Letter Sent	If desired, you can enter the date on which the thank-you letter was sent in this field.

5. Click the **Save** button. You can now apply gifts to this tribute. For details on how to do this, see page 54.

Attach a File

The **Attach a File** link at the top of the Tribute Entry Screen allows you to attach a file to the tribute record using the Hosted File Storage feature. See "Hosted File Storage" on page 318 for details. This link does not appear until after the tribute has been entered and saved.

Editing a Tribute

▶ To edit a tribute

1. From the Tributes screen, find the tribute you want to edit, and click the **Edit** link next to it.
2. Make any changes to the tribute information. If there are gifts linked to this tribute, a list of them appears in the **Linked Gifts** section at the bottom of the screen.
3. Click the **Save** button.

Deleting a Tribute

▶ To delete a tribute

1. From the Tributes screen, find the tribute you want to delete, and click the **Delete** link next to it. A message appears, asking if you're sure you want to delete the tribute.
2. Click **OK**. The tribute is removed from the system.

Reporting on Tributes

You can run several reports for details, including gifts and contributors, on your tributes. For more information on these reports, see page 241.

Entering Contacts

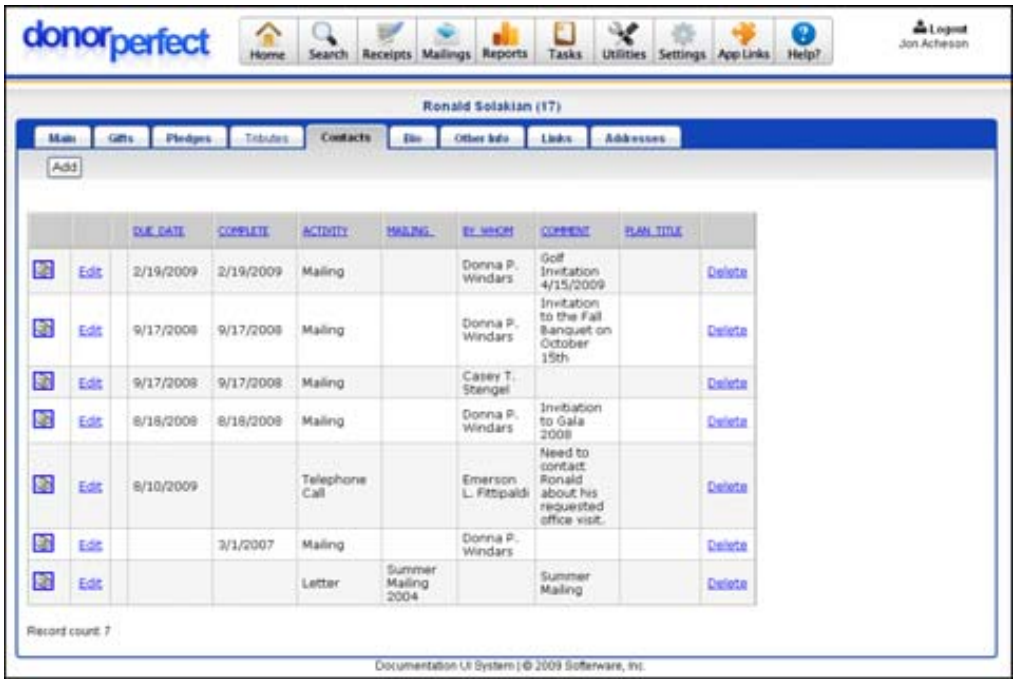
Managing contacts in DonorPerfect Online can help you organize your work and keep track of ongoing projects and their associated follow-up activities. To set DonorPerfect to automatically remind you when an activity is due, activate the **Contacts Manager Shows at Start-Up** feature in **Settings, Parameters, General Parameters** (see page 385 for more details).

Note: In DonorPerfect Online terminology, a "contact" refers to a point of contact, such as a meeting, phone call or email message. It does not refer to the person being contacted, who would be entered into the system as a constituent.

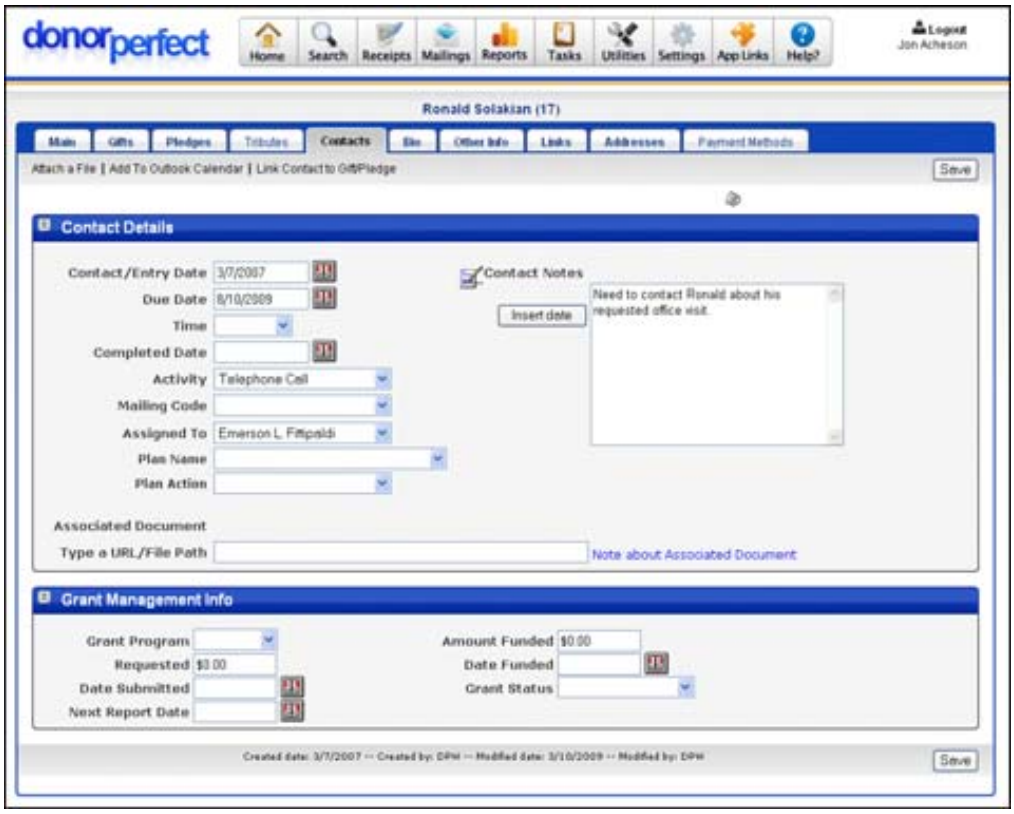
Entering a Contact Record

▶ To enter a contact record

1. Select a donor using the Search screen (see page 27).
2. Click on **Contacts**. The Contacts List Screen appears.



3. To add a new record, click the **Add** button. To access an existing record, click on **Edit** next to desired record**.** The **Contacts Entry Screen** appears.



4. Use the **TAB** key to move from field to field or click on the desired field. For details on each field on-screen, see the next section.

5. Click **Save** to save the information entered when done. To access any other entry screen, select the desired link on the menu bar above. When you are finished entering all information for the record, click **Search** to lookup or add a new record.

Note: The Contacts Entry Screen, like all DonorPerfect entry screens, can be modified to meet your organization's individual needs. Therefore, the figure shown may not match the layout used by your organization.

Contacts Entry Screen Field Descriptions

You can complete any of the following information for a contact:

Contact/Entry Date	The date on which the contact record was created.
Due Date	The date you plan to perform the activity. If the automatic reminder option is turned on, it will remind you of any activities with due dates prior to or equal to the current date that do not have the Completed Date filled in.
Completed Date	The date the activity was actually performed.
Activity	The activity to be performed. For example activities, see Appendix B.

Assigned To	The person who is assigned to perform the activity. If the automatic reminder option is turned on, it only lists activities due that have a contact person code that matches the login ID.
Plan Name	If this contact record is part of a Moves Management Plan, the name of the plan appears in this field. For details on adding a contact record as part of a Moves Management Plan, see page 294.
Plan Action	If this contact record is part of a Moves Management Plan, the specific action in the plan that is associated with the contact record.

Attach a File

The **Attach a File** link at the top of the Contact Entry Screen allows you to attach a file to the contact record using the Hosted File Storage feature. See "Hosted File Storage" on page 318 for details.

Delete a Contact Record

▶ To delete a contact record

1. From the Main Entry Screen, click **Contacts.** The Contacts List Screen appears.
2. Click **Delete** next to desired record. The following message appears: **Are you sure you want to delete this record?**
3. Click **OK** to confirm.

Microsoft Outlook Integration

DonorPerfect Online allows Microsoft Outlook users to generate DonorPerfect Online contact entries based on their email correspondence with donors. There is also a Calendar Integration feature that allows users to export contacts from DonorPerfect Online to their Outlook Calendars.

In order to use this feature, you must:

- Have Outlook 2003 or newer installed on your computer.
- Install the DonorPerfect Online Outlook Integration Tool on your computer.
- Enable Outlook Calendar Integration in DonorPerfect Online

Installing Outlook on Your Computer

The DonorPerfect Online Outlook Plug-in does not require any special steps during the installation of Outlook. It does not matter whether you use Outlook Server or not.

Installing the DonorPerfect Online Outlook Plug-in

Note: Before beginning the installation process, close Outlook on your computer.

▶ To install the DonorPerfect Online Outlook Plug-in:

1. In the DonorPerfect Online navigation bar, click **Help** then **Downloads**.
2. Under **DPO – Outlook Integrator**, download **DPO_OutlookIntegration.exe**:
   - In Internet Explorer, right-click on the hyperlink, select **Save Target As**… and save the installer file to your computer.
   - In Mozilla/Firefox, right-click on the hyperlink, select **Save Link As**, and save the installer file to your computer.
3. Run **DPO_OutlookIntegration.exe** and follow the on-screen instructions.
4. Once the installation process is complete, re-open Outlook. You should now see a new **Save to DPO** button in the toolbar.

Note: This plug-in must be installed on each individual user's computer.

Enabling Outlook Calendar Integration in DonorPerfect Online

Generating DPO contacts from your Outlook emails requires no extra settings in DPO. Once you install the Outlook Plug-in, you are good to go.

The Calendar Integration feature must be enabled in the DPO Parameters screens. This feature can be enabled at the system level, or at the individual user level. User level settings override system level settings.

▶ To enable Outlook Calendar Integration at the system level

1. In the navigation bar, click the **Settings** button, then click **Parameters**.
2. In the Parameters screen, click **General Parameters**.
3. Check **Enable Outlook Calendar Integration**.
4. Click the **Save** button.

▶ To enable Outlook Calendar Integration at the user level

1. In the navigation bar, click the **Settings** button, then click **Parameters**.
2. In the Parameters screen, click **User Settings**.
3. Check **Automate Outlook Calendar Integration**.
4. Select your time zone from the list provided.
5. If desired, check **Adjust Outlook Integration for Daylight Savings Time** to adjust the time settings for Daylight Savings Time.
6. Click the **Save** button.

Importing Outlook Emails as DonorPerfect Online Contact Entries

▶ To import an Outlook email as a DonorPerfect contact entry

1. From Outlook, highlight one or more emails that you would like to import into DonorPerfect.
2. Click the Save to DPO button in your Outlook toolbar.
3. You will be prompted with a warning from Outlook:

Note: This is a security measure designed to ensure that you don't expose your email system to any undue threats.

4. Check **Allow access for** and select a period of time.
5. Click the **Yes** button.
6. The Save to DPO screen appears:

7. Enter your DPO **User ID** and **Password**.

8. Click the **Save to DPO** button. The emails are exported to DPO and matching contact entries are generated.

Note: Messages will be matched to DPO donor records by comparing the email address in the From: field with the email addresses in DPO. If no match is found, a new DPO donor record will be created.

9. Once the export is finished, click the **Close** button to exit the **Save to DPO** screen.

Exporting a Contact to the Outlook Calendar

Anywhere you see the Outlook icon (), you can export a contact to your Outlook Calendar. You will find these icons on any donor Contact record and in the Contact Management reports section of the program.

▶ To create an Outlook Calendar entry from the Contact Screen

1. Navigate to any donor and select any existing Contact record.
2. Click the **Outlook** icon .

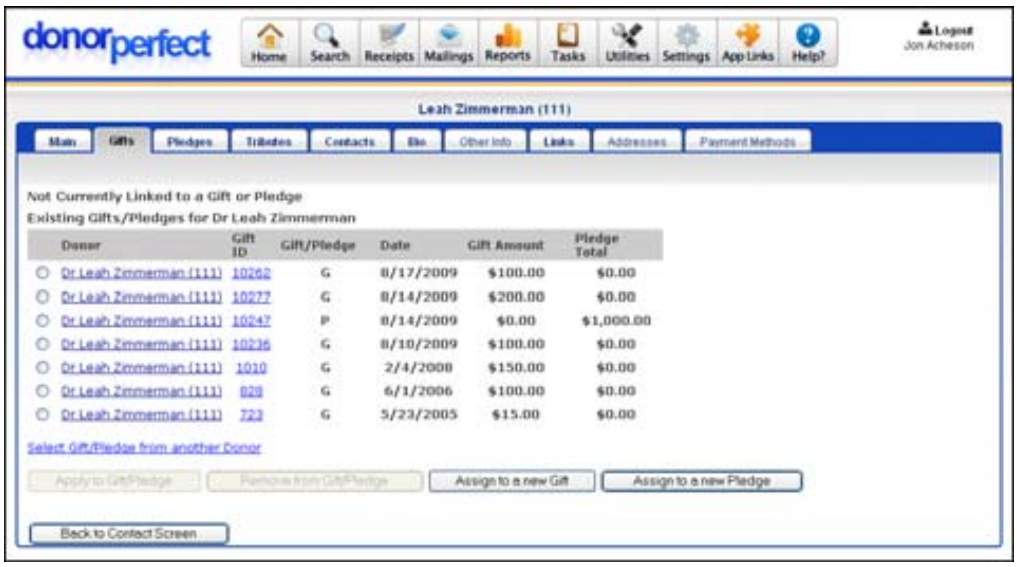
   An Outlook Calendar Entry screen will appear. Note that any information you have input in DonorPerfect will populate in this screen.
3. Check the information that has been entered, and make any adjustment (reminders, categories, etc) that you deem necessary.
4. Click **Save and Close** in the upper left-hand corner of the Outlook Calendar Entry screen.
5. Now check your Outlook Calendar, and you will see that the entry has been posted.

Linking a Contact to a Gift or Pledge

You can link a contact to a gift or pledge as a way of indicating that the gift or pledge resulted from that contact.

▶ To link a contact to a gift or pledge

1. Edit the contact record.
2. Click the **Link Contact to Gift/Pledge** link at the top of the screen. A screen appears that lists the existing gifts and pledges for that constituent:

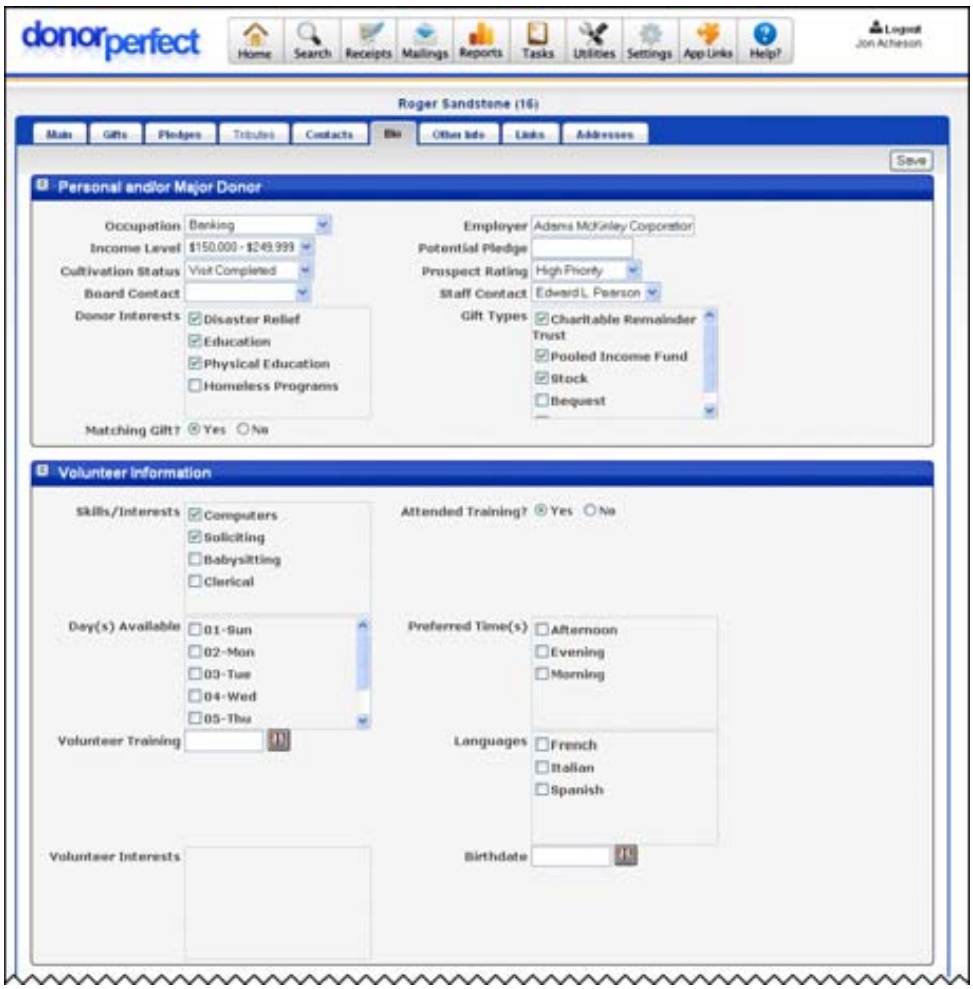


3. Select the gift or pledge you want to link to by clicking on the circle to the left of the listing.
4. Click the **Apply to Gift/Pledge** button.

5. Click the **Back to Contact Screen** button to return to the Contact Edit screen.

Biography Screen

The **Biography** screen shows additional fields from the main database. Examples of items on this entry screen are capital campaign information, major donor research, volunteer planning, alumni status, etc. The fields on this screen are all user-defined. To set user-defined fields, see "Screen Designer" on page 393.

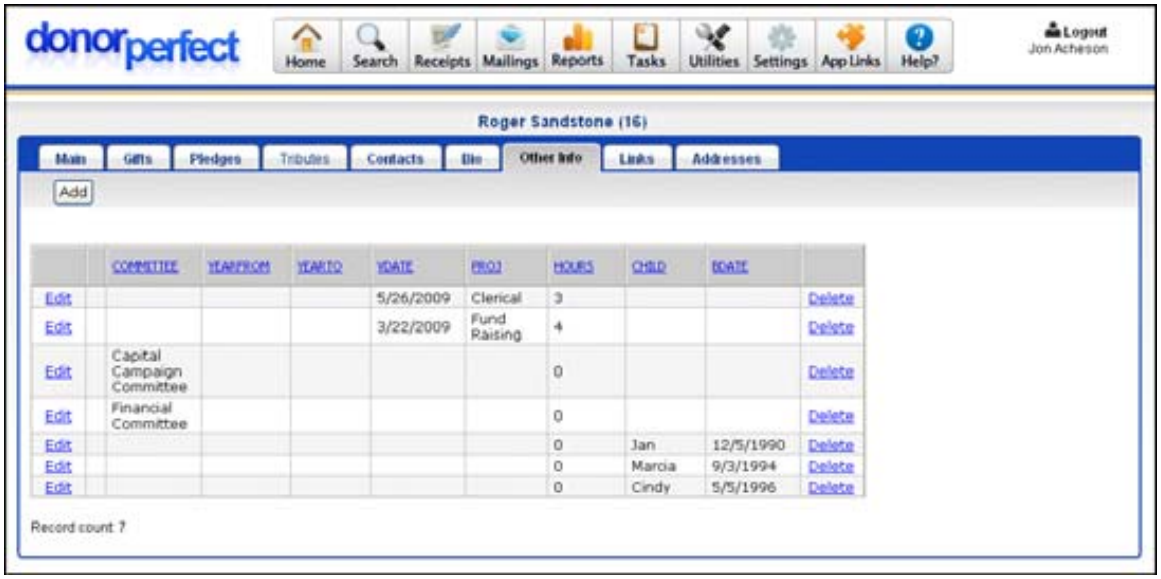


▶ To access the Biography screen

1. Select a donor using the Search screen (see page 27).
2. Click the **Bio** tab in the Main Entry Screen.

To enter biographical information, fill out the fields and click the **Save** button.

Entering Other Information



The Other Information screen contains additional transactional information and is optional. Uses for this screen vary widely among different organizations, so there are no standard fields that appear on the screen. Examples are student information and volunteer hour tracking. Like all DonorPerfect entry screens, it can be modified to meet your organization's individual needs. Therefore, the figures shown below may not match the layout used by your organization.

Accessing the Other Information Screen

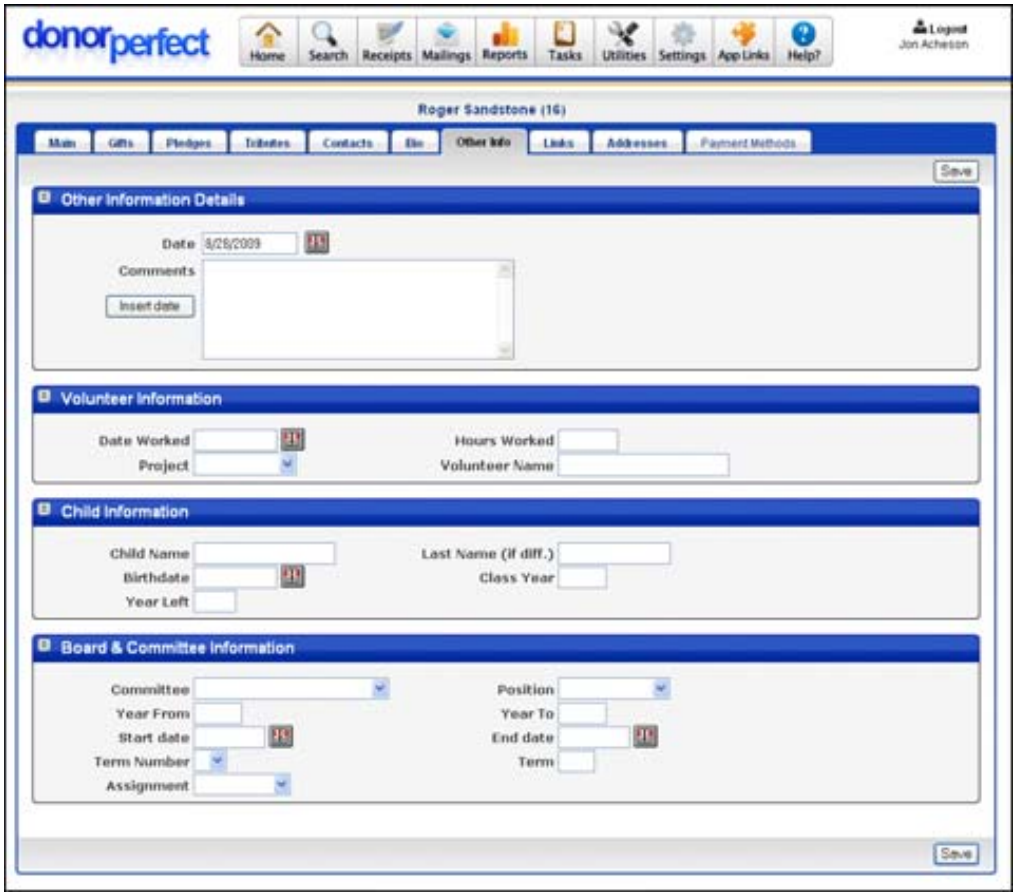
▶ To access the Other Information screen

1. Select a donor using the Search screen (see page 27).
2. Click the **Other Info** tab in the Main Entry Screen. The Other Information screen appears.

Entering an Other Information Record

▶ To enter an other information record

1. Click the **Add** button at the top of the Other Information screen. The Other Information Entry Screen appears.



2. Use the TAB key to move from field to field or click on the desired field. Click **Save** to save the information entered when done. To access any other entry screen, select the desired screen area. When you are finished entering all information for the record, click the **Save** button to return to the Other Info List screen.

Editing an Other Info Record

▶ To edit an Other Information record

1. In the Other Information screen, click the **Edit** link next to the desired record. The Other Information Entry screen will open, displaying the information currently entered for the record.
2. Edit the information as desired.
3. Click the **Save** button to save your changes and return to the Other Info List screen.

Attach a File

The **Attach a File** link at the top of the Other Information Entry Screen allows you to attach a file to the Other Info record using the Hosted File Storage feature. See "Hosted File Storage" on page 318 for details.

Delete an Other Information Record

▶ To delete an other information record

1. From the Main Entry Screen, click on the **Other Info** tab. The Other Information screen appears.
2. Next to the desired record, click the **Delete** link. The following message appears: **Are you sure you want to delete this record?**
3. Click **OK** to confirm.

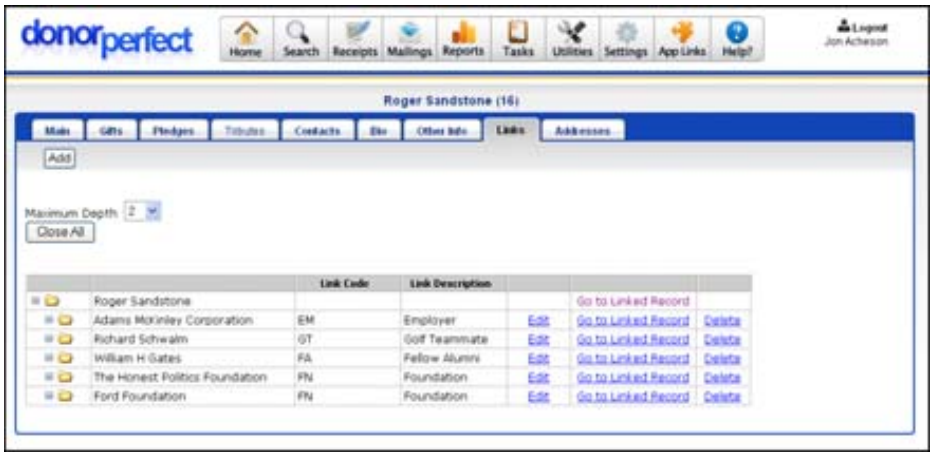
Link Entries

The **Link Screen** stores an unlimited number of "links" between records. For instance, you can link a donor to their employer's record. This option can only be used if both records have been entered in the system. You'll see the links in a tree form, as shown below. This enables you to see, at a glance, the relationships between your donors.

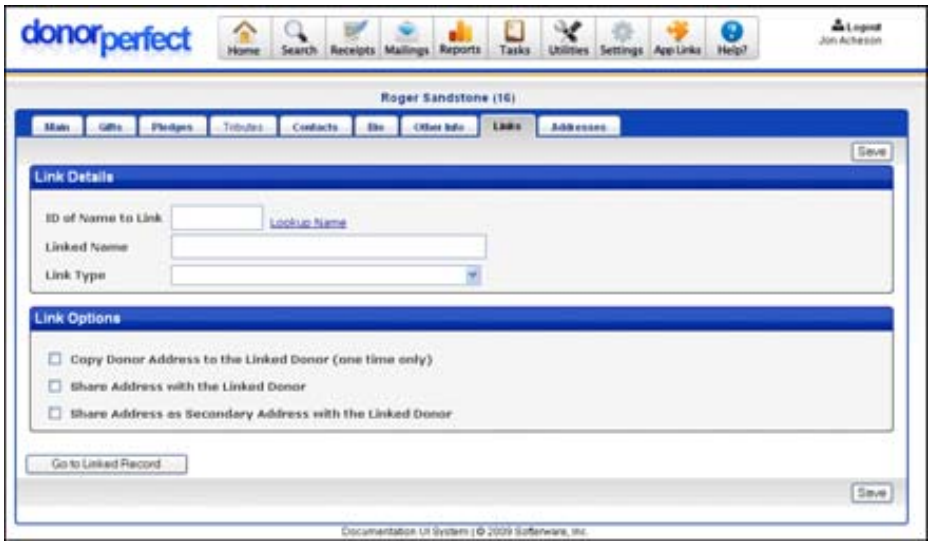
Entering Links

▶ To enter links

1. Select a donor using the Search screen (see page 27).
2. Click on the **Links** tab in the Main Entry Screen. The Links Screen appears.



3. To add a new link, click the **Add** button. To access an existing link, click the **Edit** link next to desired link record**.** The **Link Entry Screen** appears.



4. Use the **TAB** key to move from field to field or click on the desired field.
5. If you know the ID of the record you are linking to, you may enter it directly in the **ID of Name to Link** field. However, you will seldom know this, so you will usually have to look up the name. To do this, click **Lookup Name**. Enter the name you want to link to and click **Lookup**. DonorPerfect will display the names matching the one you entered. Click on the appropriate name. DonorPerfect will automatically enter the ID and name for the donor you're linking to.
6. Choose the link type designating the relationship between this record and the linked record.
7. In the **Link Options** section, you can choose how you want address information handled between linked records. The following options are available:
   - **Copy Donor Address to the Linked Donor (one time only):** when the link is saved, the record that is linked to is updated with the address from the record you created the link for. For example, if Roger Sandstone is linked to his wife Mary, Mary's address is updated with Roger's address, but it is only updated one time.
   - **Share address with Linked Donor**: each time the address on either linked record is updated, a warning message appears, asking if you want to update the address on both records.
   - **Share Address as Secondary Address with the Linked Donor**: for the record that is linked to, a secondary address is created with the address of the record you created the link for. For example, if Roger Sandstone is linked to his wife Mary, Roger's name and address appear as a secondary address in Mary's record. Each time Roger's address is edited, a warning message appears, asking if you want to update that secondary address in Mary's record. Each time that secondary address in Mary's record is updated, a warning message appears, asking if you want to edit Roger's address.
8. When you are finished entering information for the record, click **Save**.

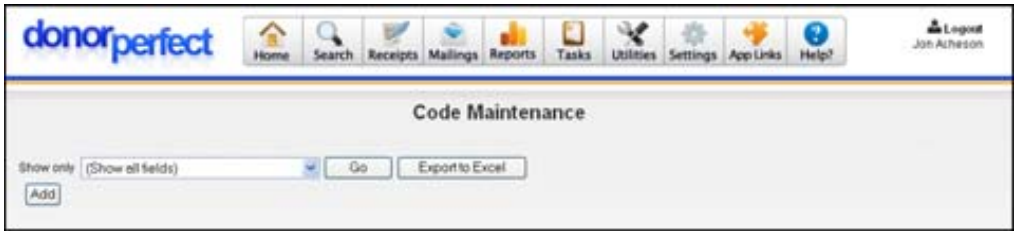
Reciprocal Link

When a link is created from one record to another, the system automatically creates a reciprocal link from the second record back to the first. For instance, if the Greenbaum Foundation is linked to Roger Sandstone's record as the Employer, a link will automatically be created in the corporation's record for Roger Sandstone as an Employee.

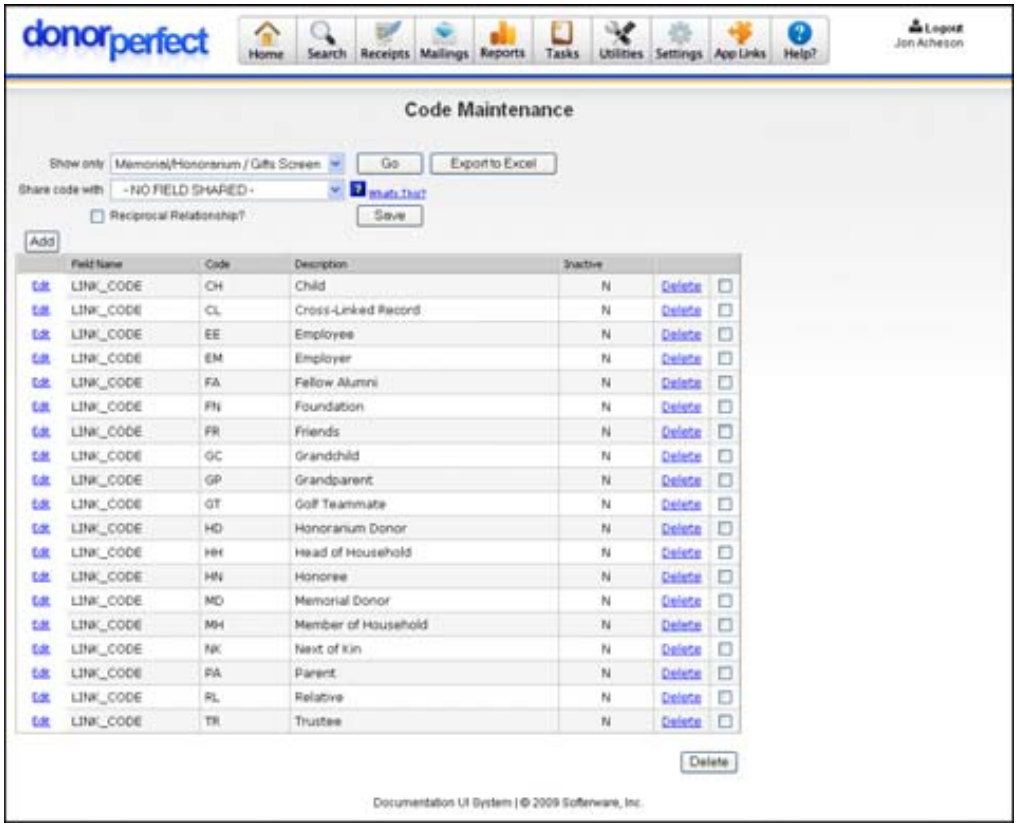
In order for this to work properly, however, you must specify for each type of link what the corresponding reciprocal link type will be. For instance, for **Parent**, you would specify that the reciprocal link should be a **Child** link. This is set up in the Code Maintenance screen.

▶ To configure the reciprocal links for each link type

1. From the Navigation bar, select **Settings**, then **Code Maint.**

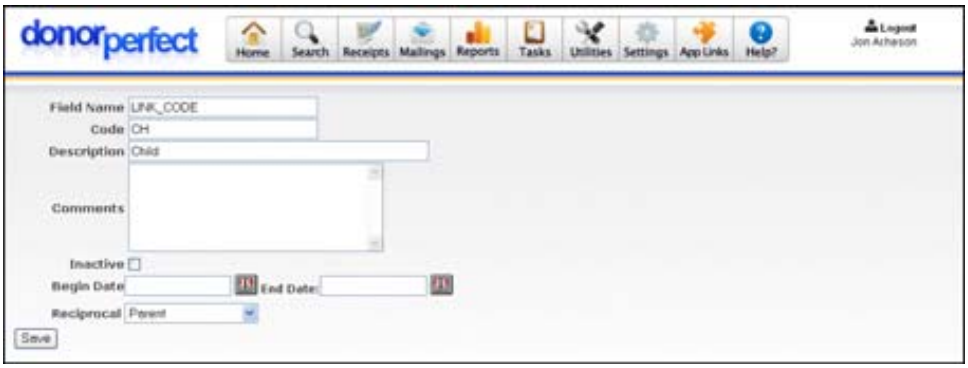


2. Set **Show only** to **Link Type**.
3. Click the **Go** button. The current link type codes in the system will be listed.



4. For each link type code, do the following:

a. Click the **Edit** link in the entry for that code. The Code Entry screen for that code will open:



b. Set **Reciprocal** to the type of link to be used in the reciprocal link. For instance, for the **Child** link type, you would select **Parent**.

c. Click the **Save** button. You will be returned to the list of link types.

5. Once the reciprocal link types have been set up for all of the link type codes, you are good to go.

Delete a Link

▶ To delete a link

1. Click the **Links** tab on the Main Entry Screen. The **Links Screen** appears.
2. Click **Delete** next to desired link record. The following message appears: **Are you sure you want to delete this record?**
3. Click **OK** to confirm.

Note: You are only deleting one side of the link. If you want to delete the reciprocal, you will need to go into the reciprocal record and perform the delete process again. Deleting the link for a record doesn't delete the actual record.

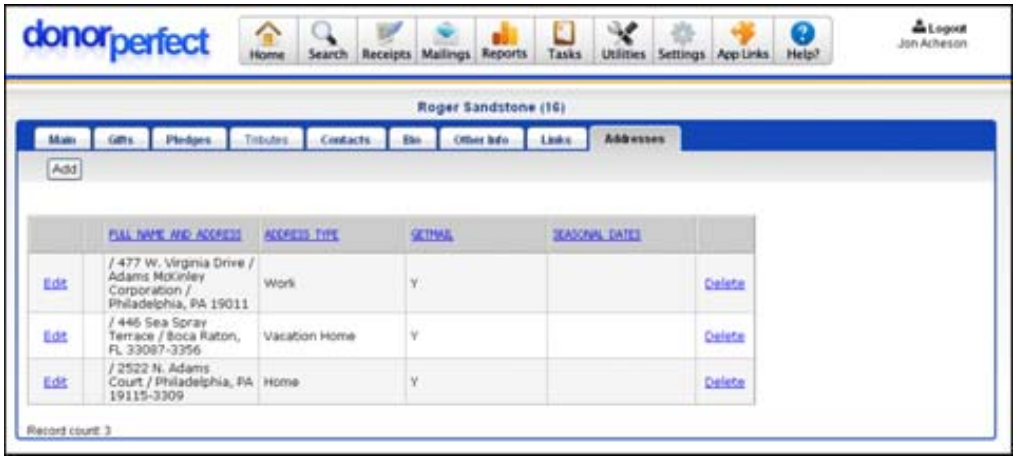
Using the Addresses Screen

The **Addresses Screen** allows you to enter additional addresses. To activate, go to **Settings**, **Parameters** and select **Mailings: Mailmerge**, **Email**. Then, check **Account for Seasonal Address in Merge File**. See page 381 for more details.

Adding an Additional Address

▶ To add an additional address

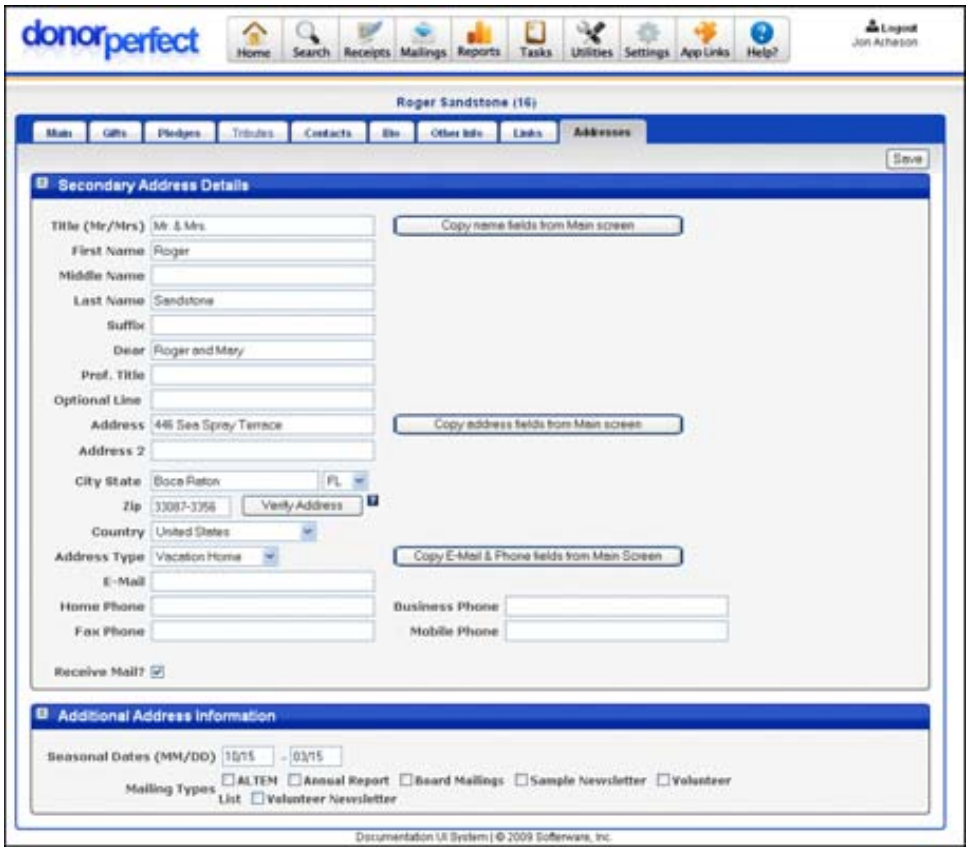
1. Select a donor using the Search screen (see page 27).
2. Click on the **Addresses** tab in the Main Entry Screen. The Addresses Screen appears.



3. To add a new address, click the **Add** button. To access an existing record, click **Edit** next to desired record**.** The **Addresses Entry Screen** appears.
4. Use the TAB key to move from field to field or click on the desired field.
5. To copy the name field data from the **Main Screen** into the secondary address name fields, click **Copy name fields from Main screen**. Only the fields populated on the **Main Screen** will be populated on the **Addresses Screen**.
6. Address fields from the **Main Screen** may be copied in a similar manner. Click **Copy address fields from Main screen,** to populate the corresponding address fields on the **Addresses Screen**.
7. Click **Save** to save the information entered when done.

   To access any other entry screen, select the desired link on the menu bar above. When you are finished entering all information for the record, click **Search** to lookup or add a new record.

The salutations, suffixes, and titles may be different from the Main Screen as appropriate for each additional address. For instance, a more personal salutation may be used on the Sandstone vacation address.



Addresses Screen Field Descriptions

You can complete any of the following for each additional address:

- **Address Type:** Use this pull-down to select which type of address the new address is.
- **Receive Mail?:** If an address should receive mail, select this check box. If this option is not selected, the address will not receive mail.
- **Seasonal Dates:** Addresses may be marked with seasonal dates to provide a means to mail to vacation homes or otherwise non-full time addresses. Enter the month and day for the start and end dates for each address.
- **Mailing Types:** To select a mailing type for each address, check the appropriate check box. More than one mailing type may be selected for each address. This feature is utilized when creating mail merge files and sending out group emails. The mailing types are codes that may be edited in **Code Maintenance**—see page 357**.** If no mailing types are visible, you must add them in **Code Maintenance.**

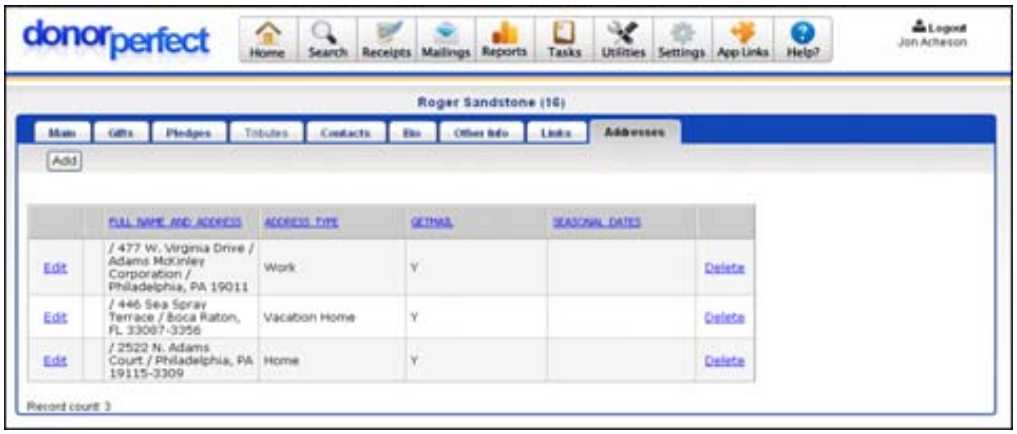
Attach a File

The **Attach a File** link at the top of the Addresses Entry Screen allows you to attach a file to the address record using the Hosted File Storage feature. See "Hosted File Storage" on page 318 for details.

Delete an Address

▶ To delete an address

1. From the **Main Screen**, click the **Addresses** tab. The Addresses Screen appears.



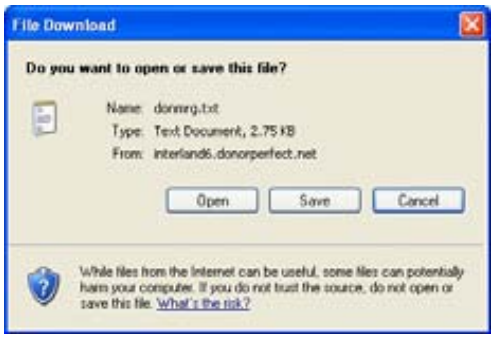
2. Next to the desired record, click the **Delete** link. The following message appears: **Are you sure you want to delete this record?**
3. Click **OK** to confirm.

Creating a Data Output File

The **Create Data Output** link located in each address entry in the Addresses screen allows you to generate a data file containing the information for that address. The data file will be a text file in comma-separated format.

▶ To generate a data file for an address

1. Click on the **Create Data Output** link at the top of the Addresses screen.



2. Click on one of the following buttons:
   - Click **Open** to open the data file in your default text editor.
   - Click **Save** to save the file to your computer.
   - Click **Cancel** to cancel out of creating a data output file.

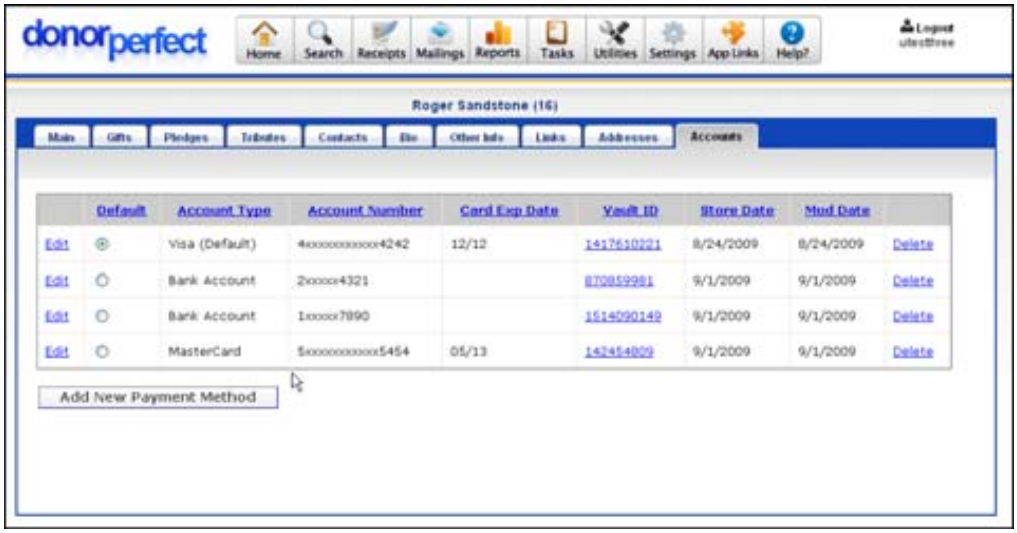
Entering Payment Methods

The Payment Methods screen allows you to enter credit card or bank account information that can be used to process EZ-EFT and Insta-Charge transactions. This screen is only accessible if you have purchased and enabled either the EZ-EFT Module or the Insta-Charge module. For details on EZ-EFT, see "EFT (Electronic Funds Transfer)" on page 293. For details on Insta-Charge, see "Insta-Charge" page 433.

Adding a Payment Method

▶ To add a payment method

1. From the Main Entry Screen, click on the **Accounts** tab. The **Payment Methods Screen** appears.



2. Click the **Add New Payment Method** button. A new screen appears where you can enter payment method details:

3. By default, the **Billing Information** fields are populated with data from the donor record. Edit this information if necessary.

4. Under **Account Information**, you can enter information for a credit card account, or a bank account.

   a. Enter the following **Account Information** for a credit card:

   Payment Method Select New Credit Card.

   Account Type Select the type of credit card. The Bank Account type refers to a card that draws from a bank account, such as a debit card.

   Name on Account The name on the credit card.

   Credit Card # The donor's credit card number. It should be entered without dashes or spaces. The system will perform a validation to check that it is *potentially* a valid card. The length of the credit card number will vary as follows:

Type	# of Digits
Visa	13 or 16
MasterCard	16
American Express	15
Discover	16

   Exp. Date The credit card expiration date, which you should enter in MM/YY format. If the card includes a specific date of expiration (for example, 10/31/06), just enter the month and year. When you generate transactions via EFT, the system will report any credit cards whose expiration dates have passed. You will need to obtain and enter revised information in order to process transactions for those accounts.

   Make Default? Check this box to make the account the one that will be selected by default when processing transactions for this donor.

   b. Enter the following **Account Information** for a bank account:

   Payment Method Select New Bank Account.

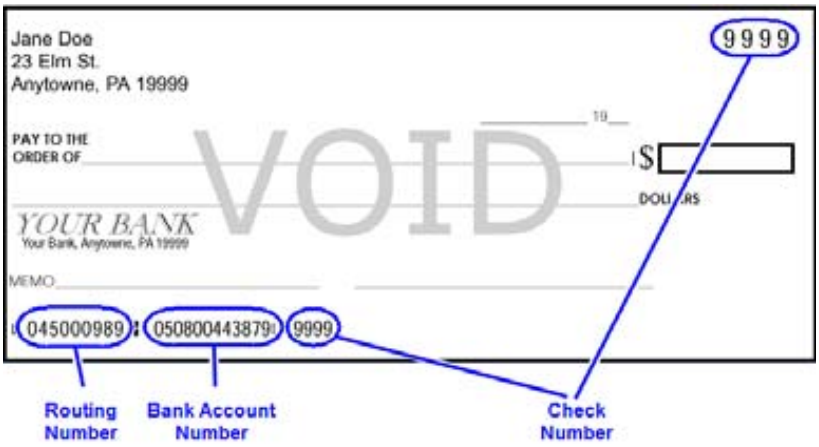
   Bank Account Type Select Checking or Savings.

   Name on Account The name on record for the account holder.

Routing Number This is a nine-digit number that identifies the donor's bank. Also called an ABA number, it usually can be found on the donor's check in the lower left corner between the (⑆) symbols (see check sample). When you enter the Routing #, the system will perform a validation on the number to ensure that your entry is valid.

> Note: Canadian customers should enter their 5-digit Transit Number and 3-digit Institution Number.

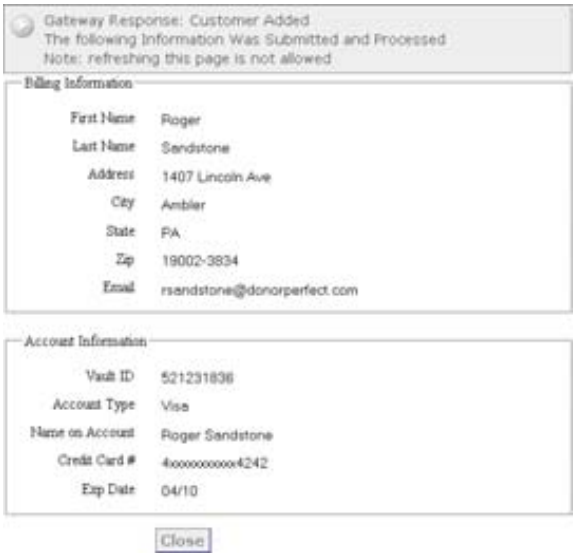
Account Number This number identifies the donor's account at his or her financial institution. The account number will also appear on the check in the lower left corner, usually after the Routing Transit # (see below). This number can be any length and may contain dashes and spaces. Dashes within the account number are entered but spaces should be ignored. At the end of the account # is a symbol that looks like a sideways equal sign (⑈).



> Note: In order for drafts to be processed successfully, it is vital that the *Routing Transit #* and *Account #* be entered correctly.

Make Default? Check this box to make this account the one that will be selected by default when processing transactions for this donor.

5. Click the **Add Payment Method** button. The form disappears, to be replaced by a report from the SofterWare Gateway listing the information for the new payment method:



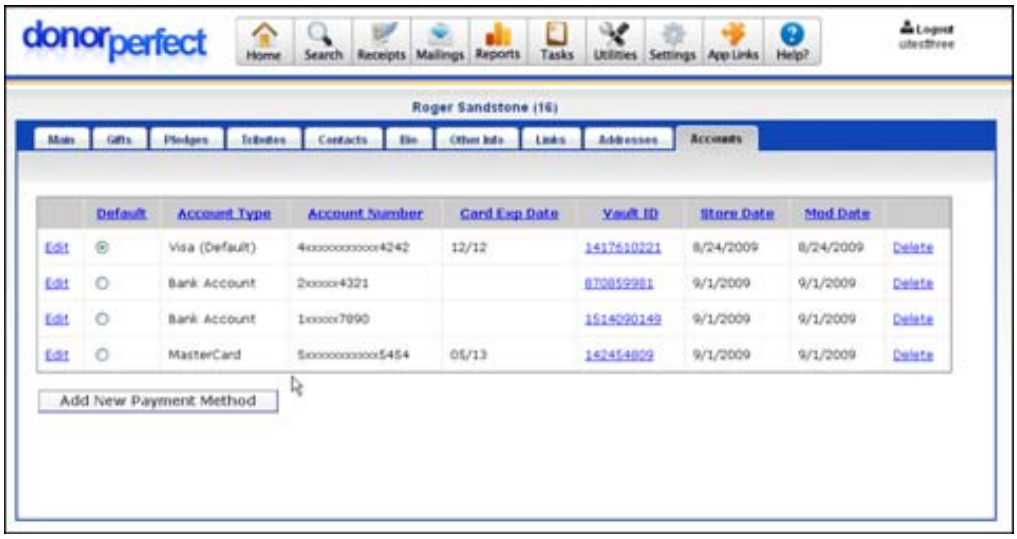
6. Click the **Close** button. The report disappears, and the new payment method appears on the list in the Payment Methods screen.

Editing a Payment Method

Once entered, you can edit any of the payment account information, except for the **Payment Method**.

▶ To edit a payment method

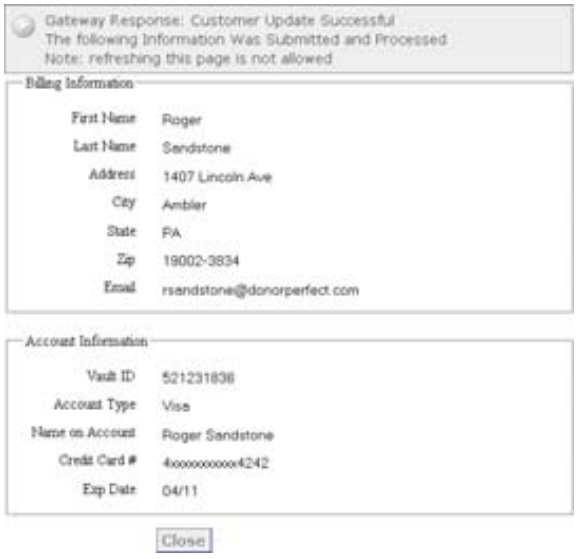
1. From the Main Entry Screen, click on the **Accounts** tab. The **Payment Methods Screen** appears.



2. Click the **Edit** button located to the left of the payment method entry. A new form appears where you can edit the **Billing Information** and **Account Information** for the payment method.

Note: You cannot change the Payment Method setting.

3. Once you have made the desired changes, click the Update Payment Method button to save your changes. The form disappears, to be replaced by a report from the SofterWare Gateway listing the updated information for the payment method:



4. Click the **Close** button. The report disappears, and the changes to the payment method appear on the list in the Payment Methods screen.

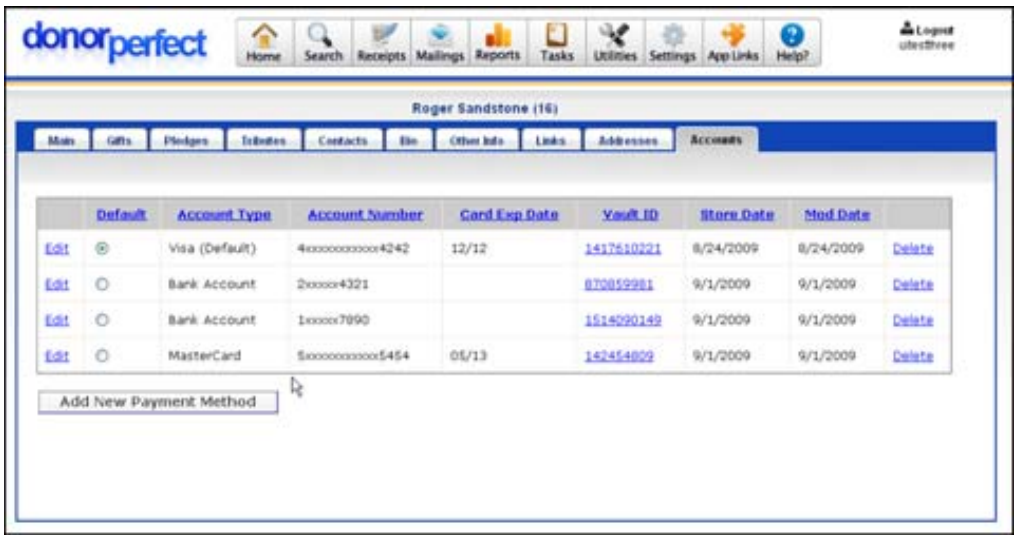
Deleting a Payment Method

You can delete payment methods from the system if needed. For instance, you can remove a credit card once it has expired.

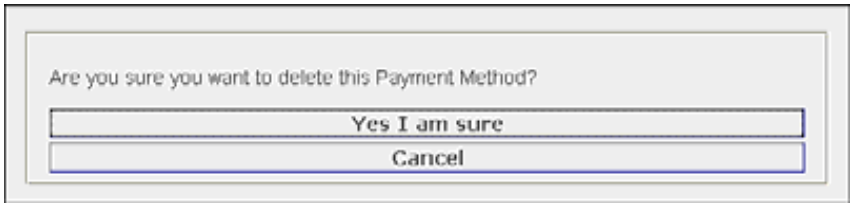
If need be, you can delete all the payment methods listed for a donor, though you will have to add a new payment method before you can process transactions for that donor again.

▶ To delete a payment method

1. From the Main Entry Screen, click on the **Accounts** tab. The **Payment Methods Screen** appears.



2. Click the **Delete** button located to the right of the payment method entry. A confirmation message appears:



3. Click the **Yes I am sure** button to delete the payment method, or click the **Cancel** button to cancel deletion.

Setting the Default Payment Method

If multiple payment methods have been entered into the system for a donor, you must designate which account will be used for preauthorized EZ-EFT payments.

To designate the account that will be selected as the default for a donor, select that account in the **Default** column of the Payment Methods screen.

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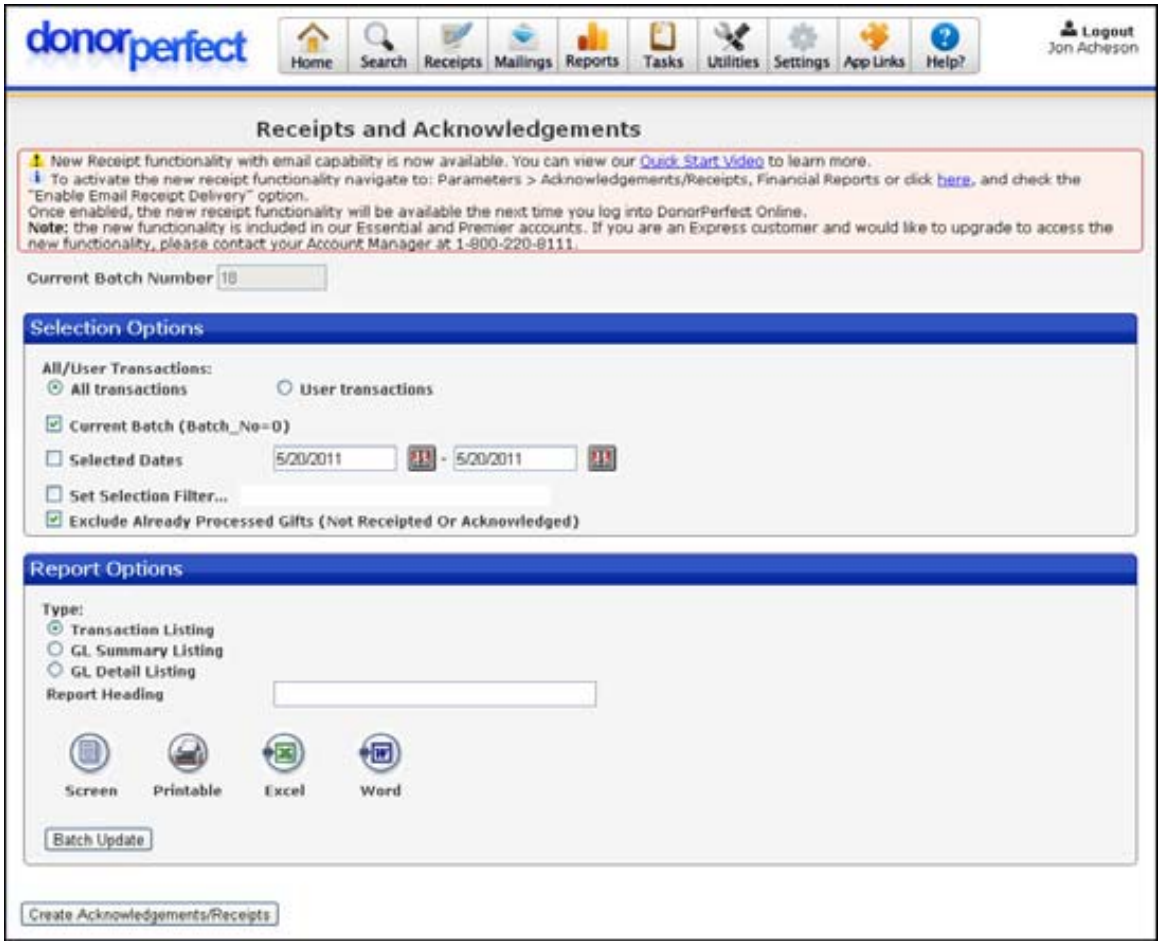
4. Generating Receipts

Receipting 1.0



Overview

The Receipts and Acknowledgments screen is used to create a verification listing and mail merge data file for all donations entered since the last acknowledgements/receipts processing. The acknowledgement process should be run every time you want to print acknowledgement letters and make deposits. . You can run this process at any time (daily, weekly, etc).

This process can also be a time saver in financial transactions. When making a bank deposit, instead of writing the entries on the deposit slip, the Transaction Listing report can be used as an attachment.

Generating Email Receipts

If you want to send out email receipts, you must use Receipting 2.0 instead. Receipting 1.0 no longer generates email receipts. Enabling email receipting in the Financial Reports /Receipt Processing parameters screen automatically enables Receipting 2.0.

Please see "Receipting 2.0" on page 103 for full details on email receipting.

Previewing Acknowledgments and Receipts

You can preview the transactions for which receipts will be generated by running the Transaction Listing Report.

Updating the Batch Number

After you've reviewed gifts and created acknowledgements/receipts, you need to update the batch number. This ensures that each gift in the batch you processed is not reprocessed again at a later time and that each gift batch has a unique number.

Sending Receipts to Seasonal Addresses

If you want to send receipts to seasonal addresses, you must do the following:

1. Check the **Account for Seasonal Addresses in Merge File** parameter in the Mailings: Mail Merge, Email Parameters screen, then log out and back in to make sure the parameter is in effect.
2. Make sure the **Receive Mail?** option is checked for the address.
3. Make sure that the current date falls within the **Seasonal Dates** range for the address.

In addition, if a different address has been associated with the gift on the Gift Entry screen, that address will take precedence over the seasonal address.

Receipts and Acknowledgements Reports

The Receipts and Acknowledgement reports are launched from the Receipts screen, instead of the Reports menu. They allow you to view the gifts added to the system since the last time that acknowledgements were processed. See "Receipts and Acknowledgments Reports" on page 264 for details.

Generating Letter Receipts

Receipting 1.0 generates a single receipt for each gift. Receipts are generated as a mail merge data file.

The steps to use this feature are:

1. Activating receipting
2. Formatting the receipt numbers
3. Entering gifts
4. Previewing receipts

5. Generating receipts

Activating Receipting

Before you can start entering gifts and generating receipts, you must first activate receipting.

▶ To activate receipting

1. From the navigation bar, select **Settings** and then select **Parameters**.
2. Click the **Entry Screens** link:
   a. On the Entry Screen Parameters screen, check **Show RECEIPT fields**.
   b. Click the **Save** button to save changes and return to the Parameters screen.
3. Click the **General Parameters** link:
   a. On the General Parameters screen, check **Activate Receipting**.
   b. Click the **Save** button to save changes and return to the Parameters screen.
4. Click the **Acknowledgements/Receipts, Financial Reports** link:
   a. On the Financial Reports/Receipt Processing screen, make sure that the **Enable Email Receipt Delivery Method** option is NOT checked. (If it is checked, you will activate Receipting 2.0!)
   b. Click the **Save** button to save changes and return to the Parameters screen.
5. Log out of DonorPerfect Online and log back in.

Adjusting Receipt Number Formatting

For details on setting the number formatting of receipt numbers, see "Receipt Numbering Setup" on page 392.

Entering Gifts

When you enter gifts into the system with receipting enabled, you will see three new fields in a Receipt Information section below Gift Details:

You do not need to enter any information into the fields; it will be filled in automatically when receipts are generated. Just enter your gifts as you normally would. See "Gift Entry" on page 50 for details.

Previewing Individual Acknowledgments and Receipts

To preview the transactions for which individual acknowledgments and receipts will be generated, run the Transaction Listing report from the Receipts screen.

Make sure the **Include Already Processed Gifts (Previously Receipted Or Acknowledged)** option is NOT checked.

See "Receipts and Acknowledgements Reports" on page 274 for details on running the Transaction Listing report.

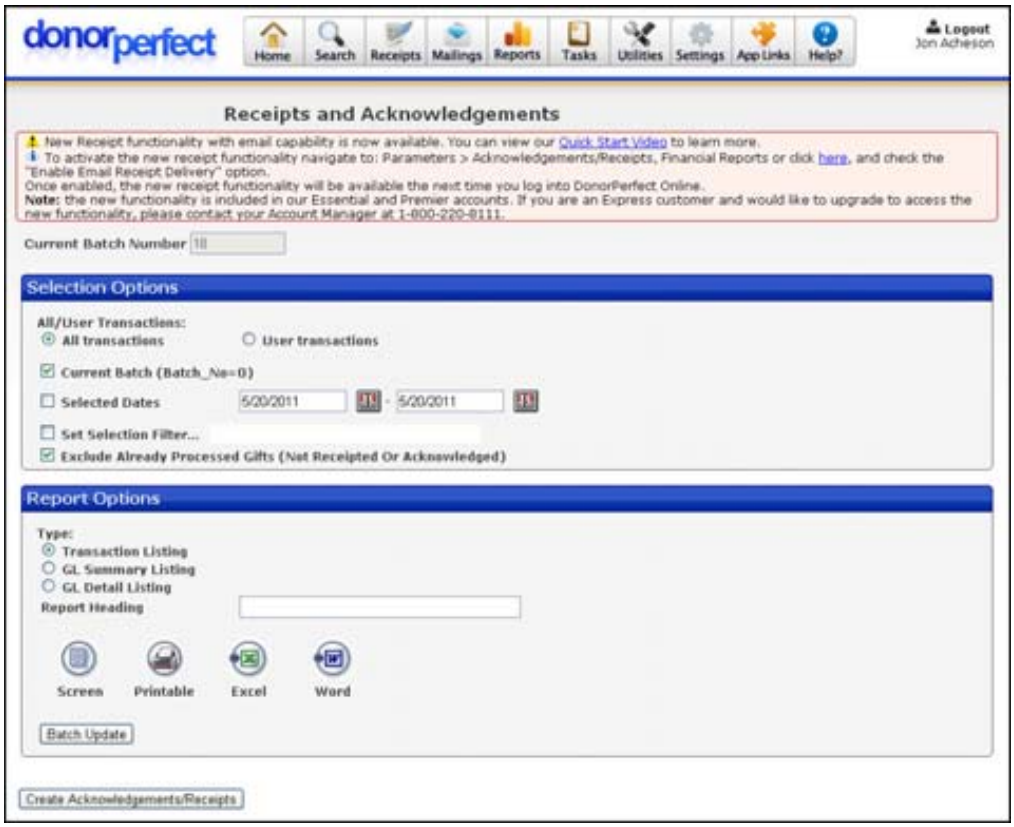
Generating Receipts

When the Receipts screen generates individual email acknowledgements and receipts, it follows the following steps:

1. The user sets receipting options and starts off the process.
2. If there are unprocessed gifts in the system, the Generate Acknowledgements/Receipts Mailmerge File screen appears, allowing you to produce one or more mail merge data files that can be used to send the letters.

▶ To generate individual acknowledgements and receipts

1. From the navigation bar, click on the **Receipts** button. The Receipts screen appears:

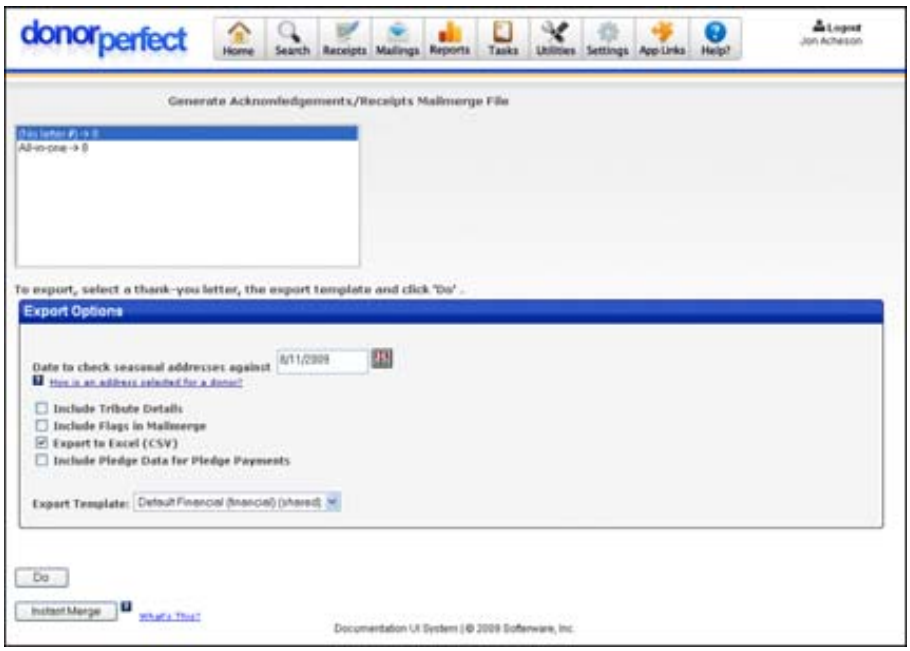


2. Set up the **Selection Options**:
   a. Set **All/User Transactions** to **User Transactions**.
   b. Check **Current Batch**. This will select only gifts that have been entered into the system after the last batch was processed.
   c. If desired, you can check the **Selected Dates** option and specify a date range. Receipts will only be generated for gifts whose dates fall within the specified date range.

d. If desired, you can check the **Set Selection Filter** option to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" in the *DonorPerfect Online User Manual* for details.

e. Make sure that the **Include Already Processed Gifts** option is NOT checked. This prevents gifts that have already been processed for receipting from being processed a second time.

3. Click the **Create Acknowledgements/Receipts** button. The Generate Acknowledgements/Receipts Mailmerge File screen appears:



4. From the list of letters that appears at the top of the screen, select the acknowledgement letter you want to use to thank donors for their gifts. At the end of each letter listed, you can see the number of gifts assigned to that letter.

5. In the **Date to check seasonal addresses against** field, enter the date. This date will determine which address for a donor is included in the file. For details on seasonal addresses, see "Using the Addresses Screen" in the "Entering Data" chapter of the *DonorPerfect Online User Manual.*

6. If you want to include details on tributes that are associated with gifts in the batch, click the **Include Tribute Details** check box. For details on entering tributes, see "Tribute Entry" in the "Entering Data" chapter of the *DonorPerfect Online User Manual.*

7. If **Include Flags in Mailmerge** is checked, a field will be added to the export file that contains a comma-separated list of all the flags for each donor.

8. If you want the mail merge file to be exported in a format that can be opened in Microsoft Excel, click the **Export to Excel** check box.

9. Check **Include Pledge Data for Pledge Payments** to include pledge data such as pledge totals along with gift record data in the export file.

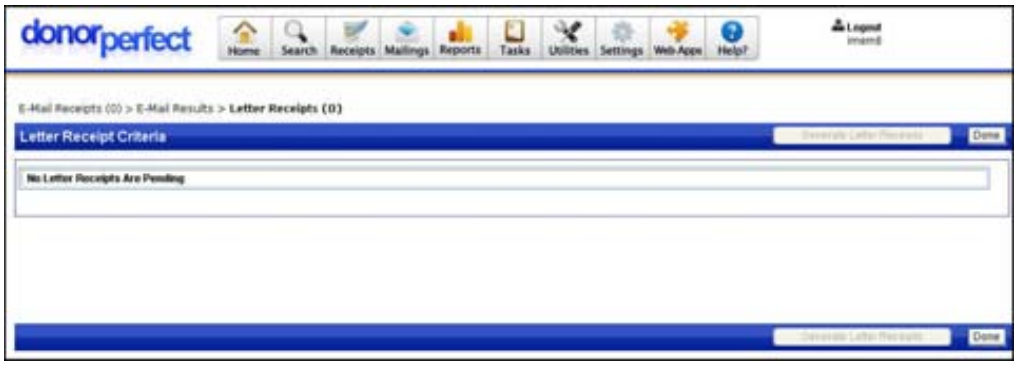
10. From the **Export Template** pull-down, choose the template you want to use for the acknowledgement mail merge data file. This template defines which fields will be included in the file you export. For details on export templates, see "Export Templates" in the "Configuring Settings" chapter of the *DonorPerfect Online User Manual.*

11. Click the **Do** button. The File Download page appears.

Note: Once this action has been submitted, receipt numbers are assigned to each gift.

12. Click the **Save** button, go to the location where you want to save the file, and then click **Save**. The file is created, and you can now use Word to customize the acknowledgement letters. See Appendix C in the *DonorPerfect Online User Manual* for more information on mail merge functions.

13. Repeat steps 1-4 until mail merge data files have been created for all **TY #** types.



14. Click the **Done** button to finish generating letter receipts and return to the Receipts page.

Updating the Batch Number

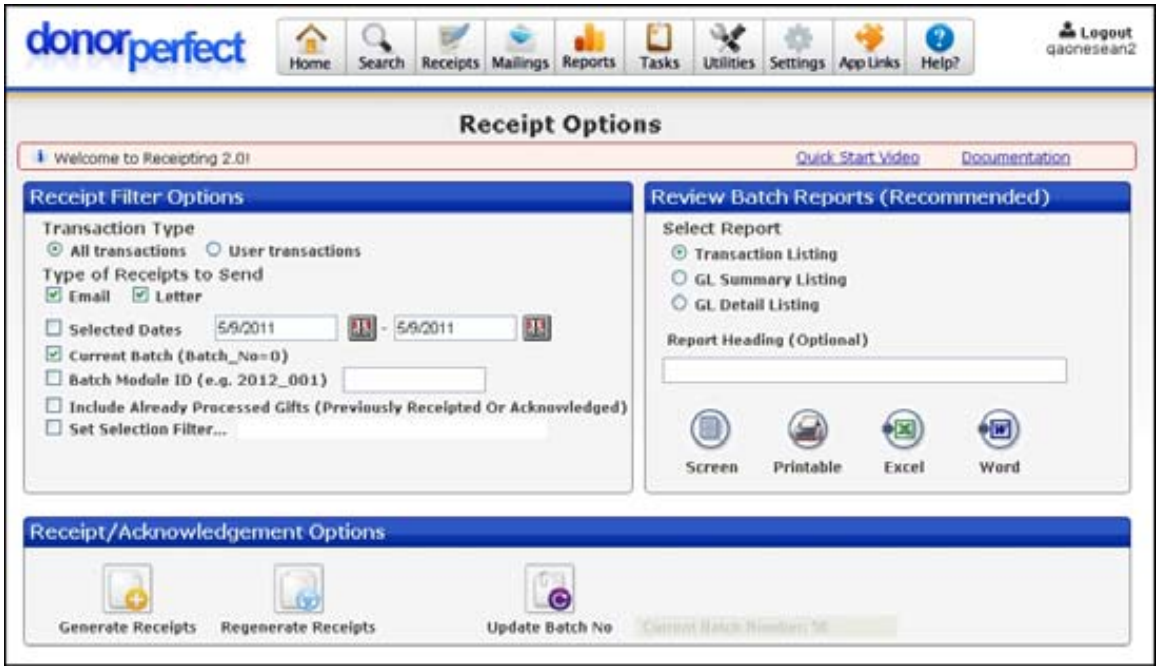
After you've reviewed gifts and created acknowledgements/receipts, you need to update the batch number. This ensures that each gift in the batch you processed is not reprocessed again at a later time and that each gift batch has a unique number.

▶ To update the batch number

1. Click the **Batch Update** button. A message appears, asking if you want to update the batch.
2. Click **OK** to confirm. The batch number is increased by one.

Important! You MUST update the batch number every time acknowledgments are created to ensure the same donors do not reappear in the next batch of acknowledgement letters.

Receipting 2.0



Overview

The Receipting features of DonorPerfect Online allow you to send receipts to your donors for the gifts they have given. Receipts can be sent via email, or you can generate a mail merge data file to send out letter receipts via Microsoft Word.

Receipting 2.0 is a redesign of the receipting process and UI that is intended to make receipting easier to understand and use. The changes for Receipting 2.0 include:

- **Email Receipting:** Receipting 2.0 is now the only way to do email receipting. Enabling email receipting in the Financial Reports/Receipt Processing parameters screen automatically switches you to Receipting 2.0.

- **Reorganized Receipt Screen:** The main Receipt Screen has been reorganized to put the receipting options in their own section on the left, and the reporting options in a section on the right. The receipt functions are in a box at the bottom of the screen. We hope that this will simplify the screen for our users.
- **Skip Email Receipts:** Users can now skip email receipts and go straight to letter receipts when processing receipts
- **Preview Outgoing Emails:** Users can preview every email receipt message before it is sent.
- Automatically create contact records for sent receipts
- Currency Symbols can be included in currency value merge fields.

Workflow

The general workflow to generate email and letter receipts is as follows:

1. Activate Receipting 2.0 if it is not already activated
2. Adjust receipt number formatting
3. Set the default receipting options
4. Enter gifts and set receipting options
5. Preview receipts
6. Generate email and letter receipts
7. Update the batch number

In addition, you can also regenerate receipts if they are lost, and run reports to track your receipting activity.

Note: The instructions in this section are for processing individual receipts only. For details on processing consolidated receipts using Receipting 2.0, please see the *DonorPerfect Online Consolidated Receipting 2.0 Guide* in the SofterWare Knowledgebase.

Enabling Receipting 2.0

For most users, Receipting 2.0 should be enabled by default. If Receipting 2.0 is not enabled, you can enable it using the following instructions:

▶ To enable Receipting 2.0

1. From the navigation bar, select **Settings** and then select **Parameters**.
2. Click the **Entry Screens** link:
   a. On the Entry Screen Parameters screen, check **Show RECEIPT fields**.
   b. Click the **Save** button to save changes and return to the Parameters screen.
3. Click the **General Parameters** link:
   a. On the General Parameters screen, check **Activate Receipting**.

b. Click the **Save** button to save changes and return to the Parameters screen.

4. To activate email receipting, click the **Acknowledgements/Receipts, Financial Reports** link:

   a. On the Financial Reports/Receipt Processing screen, check **Enable Email Receipt Delivery Method**.

   b. Set **Default Donor Receipt Delivery Method** to the receipt delivery method that your want to be selected by default for new donors:

Do not acknowledge	This donor will not receive receipts and acknowledgments.
Email	This donor will receive receipts and acknowledgments as email messages.
Email and Letter	This donor will receive receipts and acknowledgments as both email messages and printed letters.
Letter	This donor will receive receipts and acknowledgments as printed letters.

   c. Click the **Save** button to save changes and return to the Parameters screen.

5. Log out of DonorPerfect Online and log back in.

Disabling Receipting 2.0

If you want to disable Receipting 2.0 and go back to using the previous version of the receipting screen, you simply need to disable email receipting. It is no longer possible to generate email receipts using the previous version of the receipting screen.

▶ To disable Receipting 2.0

1. From the navigation bar, select **Settings** and then select **Parameters**.
2. Click the **Acknowledgements/Receipts, Financial Reports** link.
3. On the Financial Reports/Receipt Processing screen, uncheck the **Enable Email Receipt Delivery Method** option.
4. Click the **Save** button to save changes and return to the Parameters screen.
5. Log out of DonorPerfect Online and log back in.

Adjusting Receipt Number Formatting

For details on setting the number formatting of receipt numbers, see "Receipt Numbering Setup" on page 392.

Setting the Default Receipting Options

You can set the default receipting options at the system, donor and gift levels:

- The **Default Donor Receipt Delivery Method** parameter in the **Acknowledgments/Receipts** parameters screen determines the system-wide default setting for whether receipts & acknowledgments will be sent via mail, letter, email AND letter, or not at all.
- For each donor in the system, the **Receipt Delivery** field on the Main Entry Screen allows you to select whether a donor will receive no receipts, email receipts, printed letter receipts, or both email and letter receipts by default. This setting overrides the system default setting.
- Lastly, you can also select email receipting, letter receipting, both, or none when you enter a gift. The gift level setting overrides the system and donor level settings.

Setting Receipting Options for Donors

You can set receipting preferences separately for each donor. The **Receipt Delivery** field on the Main Entry Screen allows you to select whether a donor will receive no receipts, email receipts, printed letter receipts, or both email and letter receipts.

▶ To set receipting preferences for a donor

1. Open the donor record in the Main Entry Screen.
2. Set **Receipt Delivery** to one of the following settings:

Do Not Acknowledge	This donor will not receive receipts and acknowledgments.
Email	This donor will receive receipts and acknowledgments as email messages.
Email and Letter	This donor will receive receipts and acknowledgments as both email messages and printed letters.
Letter	This donor will receive receipts and acknowledgments as printed letters.

3. Click the **Save** button to save your changes.

Entering Gifts and Setting Receipting Options

You can select what kind of receipt will be sent for each gift you enter into the system.

The **Receipt Delivery** field on the Gift Entry Screen allows you to select whether a gift will generate no receipts, email receipts, printed letter receipts, or both email and letter receipts.

This setting overrides the system default and donor level settings.

▶ To set receipting preferences for a gift

1. Enter the gift as you normally would. See "Gift Entry" on page 50 for details.
2. Set **Receipt Delivery** to one of the following settings:

Do Not Acknowledge	Receipts and acknowledgments will not be generated for this gift.
Email	Receipts and acknowledgments for this gift will be sent as email messages.
Email and Letter	Receipts and acknowledgments for this gift will be sent both as email messages and printed letters.
Letter	Receipts and acknowledgments for this gift will be sent as printed letters.

3. Click the **Save** button to save your changes.

Previewing Receipts

Once your donor's gifts have been entered into the system, and you have selected the type of receipt that you want to generate for each gift, you can preview the gift transactions that will be used to generate receipts.

This can be done by running the **Transaction Listing** report from the Receipt Options screen. Make sure the **Include Already Processed Gifts (Previously Receipted Or Acknowledged)** option is NOT checked.

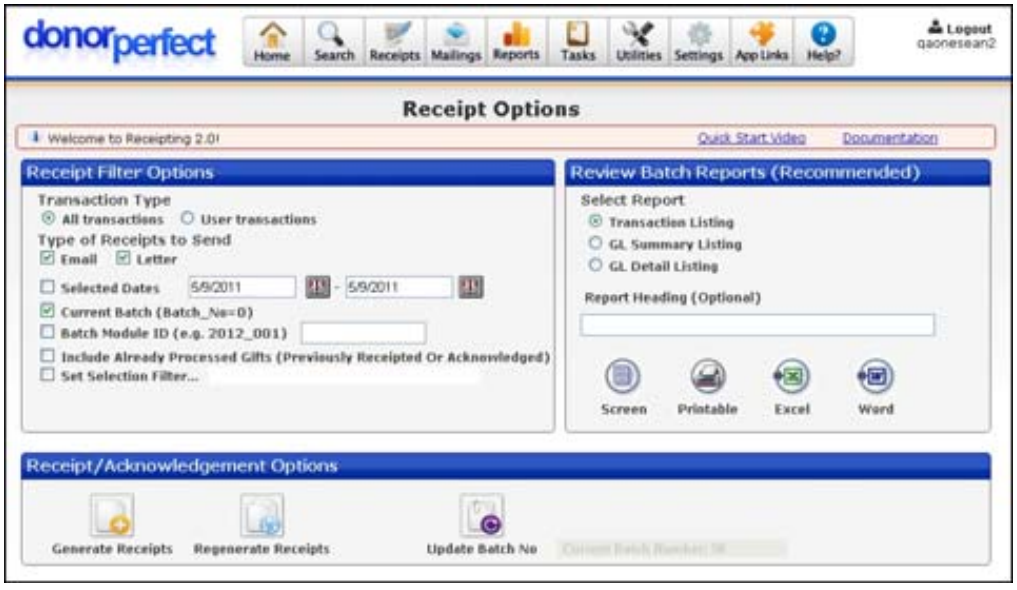
See "Running the Receipts and Acknowledgements Reports" on page 264 for details on running the Transaction Listing report.

Generating Email and Letter Receipts

Once you have previewed the receipt transactions, you can begin the receipting process in earnest by selecting options for your receipts on the Receipt Options screen. You will then generate email receipts, followed by the mail merge data files for letter receipts.

▶ To generate email and letter receipts

1. From the navigation bar, click on the **Receipts** button.



2. Set the following **Receipt Filter Options**:

Transaction Type	Select one of the following options: • Select All Transactions to display transactions from all users in the batch. • Select User Transactions to show only your current transactions.
Type of Receipts to Send	Select Email, Letter, or both.
Selected Dates	If checked, the system will select only those transactions that fall within the starting and ending dates you specify, regardless of the batch number.
Current Batch	If checked, the system will only select gifts whose Batch Number is set to 0. This is generally only true for gifts that were added to the system after the last batch was processed.
Batch Module ID	If a batch number from the Batch 1.0 or Batch 2.0 modules is entered in this field, receipts will only be generated for the gifts from that batch.
Include Already Processed Gifts	This option includes gifts that have already been assigned to a batch or assigned a receipt number from the acknowledgement processing. It is unchecked by default.
Set Selection Filter	Check to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 163 for details.

3. From the **Receipt/Acknowledgment Options** section at the bottom of the screen, click the **Generate Receipts** button:

4. If there are email receipts to be generated, the Pending Email Receipts screen appears. This screen allows you to select the email templates that will be used to generate the email messages, and then tell the system to generate the email receipts. See "Sending Email Receipts" on page 109 for details.

5. Once you generate email receipts, the Email Results screen displays the results and allows you to export records to Excel. See "Viewing Email Results" on page 111 for details.

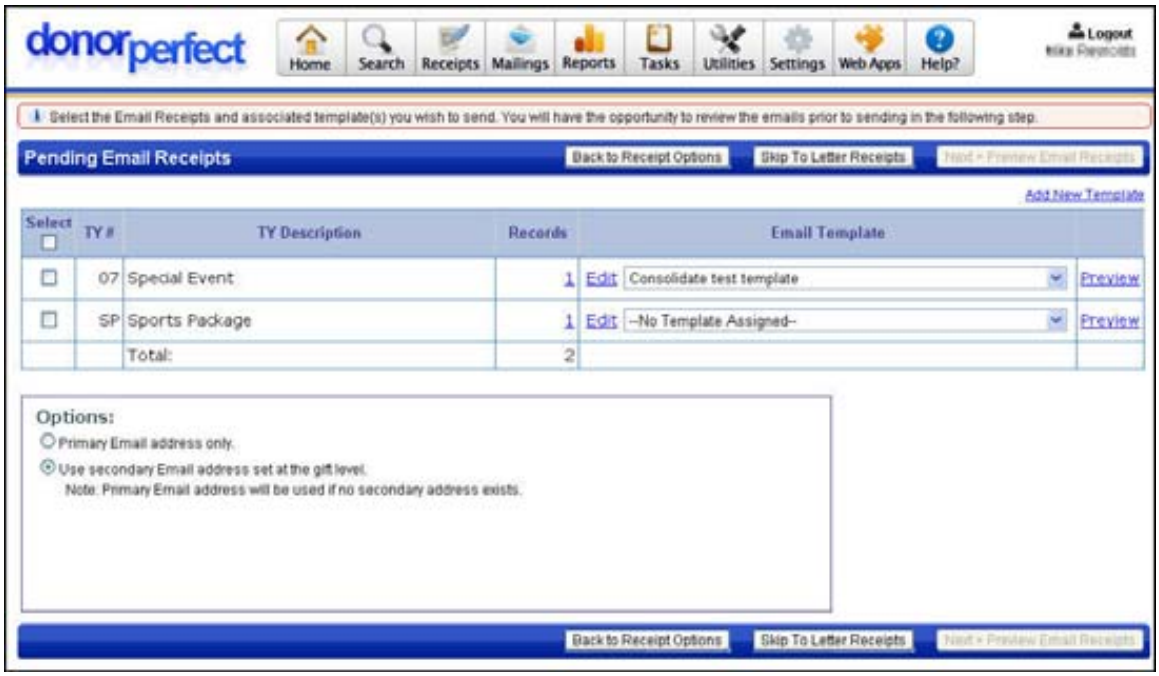
6. If you are generating individual receipts for donors whose receipting preferences specify a letter receipt, the Letter Receipts screen appears. This screen allows you to generate the mail merge data files that will be used to generate the receipt letters. See "Generating Mail Merge Data Files for Letter Receipts" on page 103 for details.

7. Once you have generated mail merge data files for letter receipts, you can click the **Done** button to return to the Receipts page.

> **Important!** If you are processing email receipts for gifts that have been marked for **Email and Letter** receipts, the gifts will not be assigned receipt numbers until after the mail merge data files have been generated from the Letter Receipts page at the end of the process. In other words, you must do both the email and the letter receipting in full to complete the process correctly.

Sending Email Receipts

If there are email receipts that need to be sent when the **Generate Receipts** button is clicked, the Pending Email Receipts screen appears.



This screen allows you to select the email templates that will be used to send the receipts, and then generate email receipts. The receipts to be sent are grouped by the thank-you letter code (**TY #**) that was entered in the gift records. There is also a category for gifts that did not have a **TY #** specified. You can choose whether to generate email receipts for each **TY #** category or not.

Skipping Email Receipting

If desired, you can skip email receipting entirely, and go straight to letter receipts. You can make a separate pass later on to generate the desired email messages.

▶ To skip email receipting

1. Click on the **Skip to Letter Receipts** button. You will go straight to the Letter Reciept Criteria page (see "Generating Letter Receipts" on page 113).

Generating Email Receipts

▶ To generate email receipts

1. Select the types of TY # that you want to generate email receipts for by checking the box in the **Select** column.
2. Select the **Email Template** that you want to use for each **TY #**. If an email template specifies a matching **TY #** in its **TY Letter** field, it will be selected by default (see "Creating a New Email Template" on page 146 for details).

> Tip: You can click the Add New Template link in the top right corner of the screen to create a new email template to use with a given thank you number. This will take you to the Email Templates screen, where you can create the new template. Once you have selected an email template for a category, you can also click the Edit link in the Email Template column for a category, and edit the selected template. Adding or editing a template will end the current receipt generation cycle. Once you have created or edited the new email templates, you will need to start over again at the Receipts screen.

3. If desired, you can click on the **Preview** link for each TY # and see a preview of what the emails that will be sent out will look like:

Use the arrow buttons to navigate between the various receipts being generated for each **TY #**, or click the **Close** button to close the preview window.

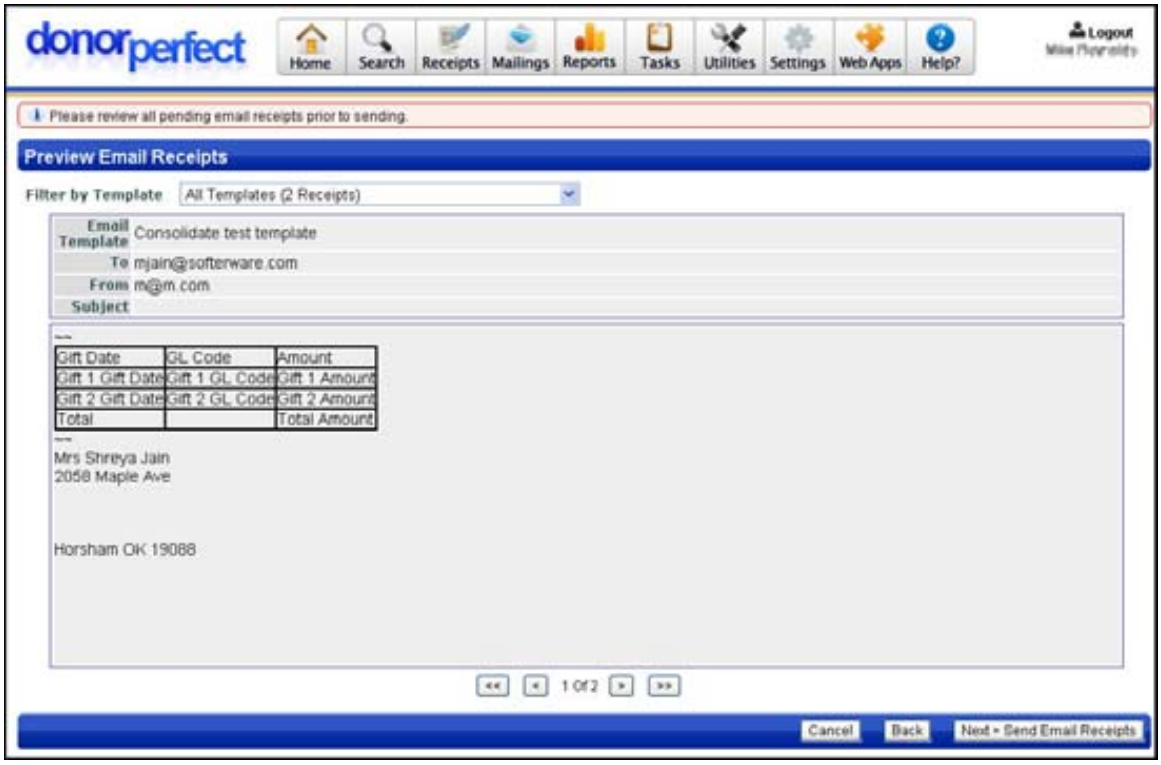
> Tip: You will also have the opportunity to preview all outgoing emails in the next step of the Receipting 2.0 process.

4. Set the following options for email receipts:

Primary Email address only	If this option is selected, the primary email address for the donor will always be used to email the receipt.
Use secondary Email address set at the gift level	If this option is selected, the donor's secondary email address, if any, will be used to email the receipt for the selected mailing types. If the user has no secondary email address, the primary address will be used.

5. Click the **Next > Preview Email Receipts** button. A "Just a Moment" message appears while DonorPerfect Online processes the email messages. Once processing is finished, the Preview Email Receipts screen will appear (see next section).

Previewing Email Receipts



The Preview Email Receipts screen allows you to preview all of your email receipts before they are sent out.

▶ To preview the email receipts

1. The **Filter by Template** list at the top of the screen allows you to change which email receipts are previewed:

   - Select **All Templates** to display the email receipts from every template that was selected in the previous screen.
   - Select an individual template to display only the email receipts that were generated using that template.

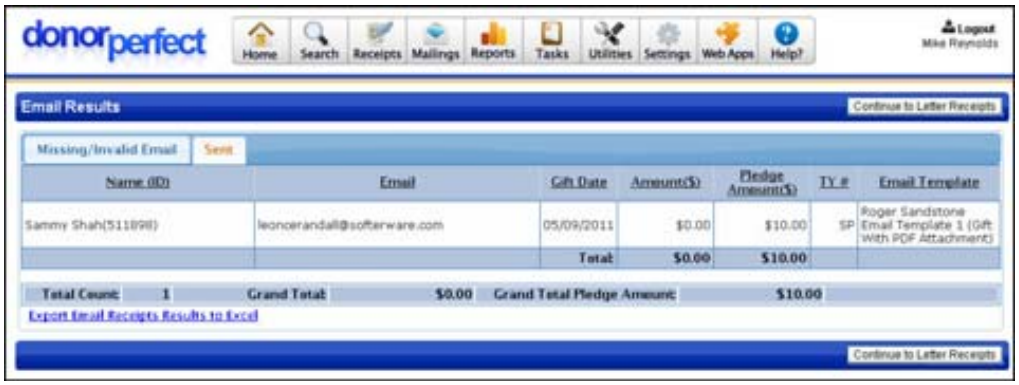
2. Use the arrow keys underneath the preview area to navigate between email receipts:
   - The < and > buttons allow you to move to the previous and next email receipts.
   - The << and >> buttons allow you to move to the first and last email receipts.
3. If there is a problem with an email receipt, you can use the **Back** button to return to the Pending Email Receipts screen and correct the issue.
4. To stop the receipting process and return to the Receipt Options screen, click the **Cancel** button.
5. To send your email receipts after previewing them, click the **Next > Send Email Receipts** button. A confirmation screen will appear:

6. Click the **Send Email Receipts Now** button to send the pending email receipts or click the **Cancel** button to stop the receipting process and return to the Preview Email Receipts screen.

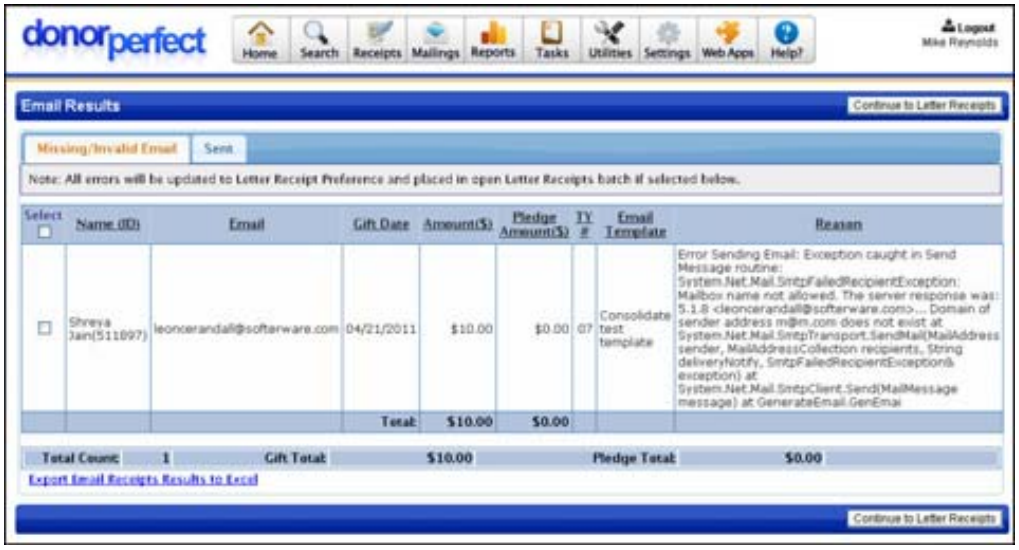
Viewing Email Results

The Email Results screen displays the results of your attempt to generate email receipts:

- Those receipts that were sent out successfully are listed on the **Sent** tab:



- If the system encountered problems with sending out some or all of your email receipts, those records will be listed on the **Missing/Invalid Email** tab.



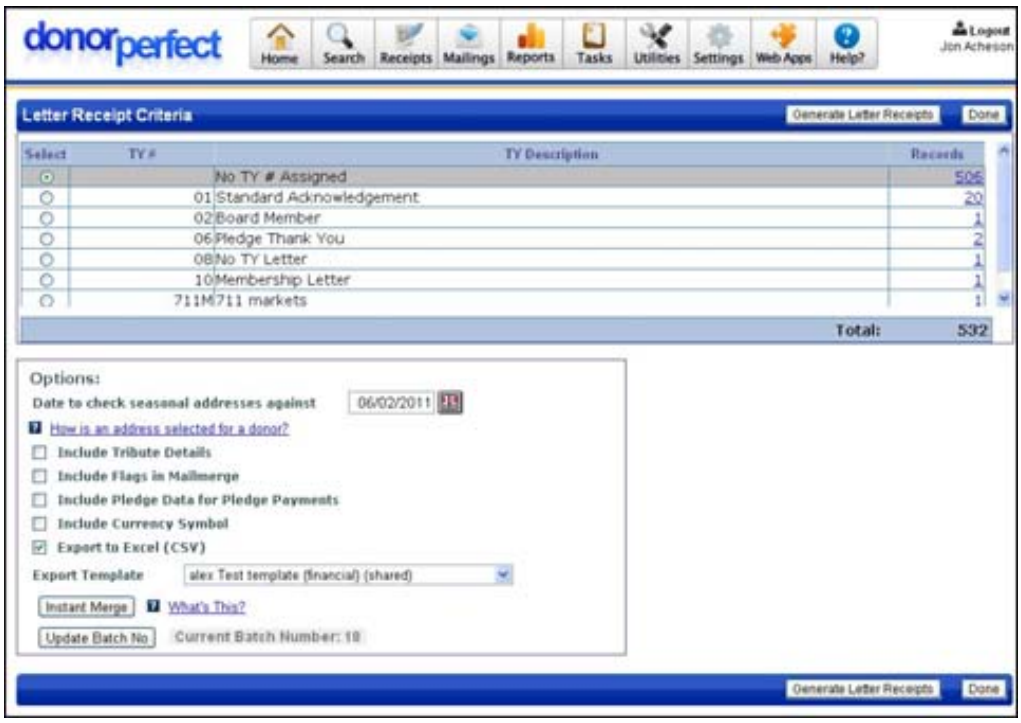
> **Note:** If the email receipt was not sent successfully for a gift, you can attempt to resolve the problem that prevented it from being sent, and then run the receipting process again. If the problem has been corrected, the email receipt should be sent successfully on the next try.

Once you have finished with this screen, click the **Continue to Letter Receipts** button to go to the Letter Receipts screen.

> **Important!** If you are processing email receipts for gifts that have been marked for **Email and Letter** receipts, you must generate both the email receipt and the mail merge data file for the letter receipt before the receipt number will be assigned to the gift records. Generating just the email receipts and returning to the Receipts page will not complete the receipting process.

Generating Letter Receipts

The Letter Receipts screen appears when you are generating individual receipts for donors whose receipting preferences specify a letter receipt. This screen allows you to generate mail merge data files for those donors.



▶ To generate mail merge data files for individual letter receipts

1. From the list of TY # types that appears at the top of the screen, select the acknowledgement letter you want to generate mail merge data files for. At the end of each letter listed, you can see the number of gifts assigned to that letter.
2. Set the following options:
   a. In the **Date to check seasonal addresses against** field, enter the date. This date will determine which address for a donor is included in the file. For details on seasonal addresses, see "Using the Addresses Screen" on page 87.
   b. If you want to include details on tributes that are associated with gifts in the batch, click the **Include Tribute Details** check box. For details on entering tributes and applying gifts to tributes, see "Adding a Tribute" on page 71 and "Applying a Gift to a Tribute" on page 62.
   c. If **Include Flags in Mailmerge** is checked, a field will be added to the export file that contains a comma-separated list of all the flags for each donor.
   d. If you want the mail merge file to be exported in a format that can be opened in Microsoft Excel, click the **Export to Excel (CSV)** check box.
   e. Check **Include Pledge Data for Pledge Payments** to include pledge data such as pledge totals along with gift record data in the export file.
   f. Check **Include Currency Symbol** to include the currency symbol in mail merge fields that contain currency values. For instance, a dollar value would include the dollar sign at the beginning of the field, and format the field as text instead of a numerical dollar amount.

> **Warning!** If the **Include Currency Symbol** option is checked, you will need to edit your mail merge templates to ensure that they do not include the currency symbol as part of their text. Otherwise, your letter receipts could display double currency symbols.

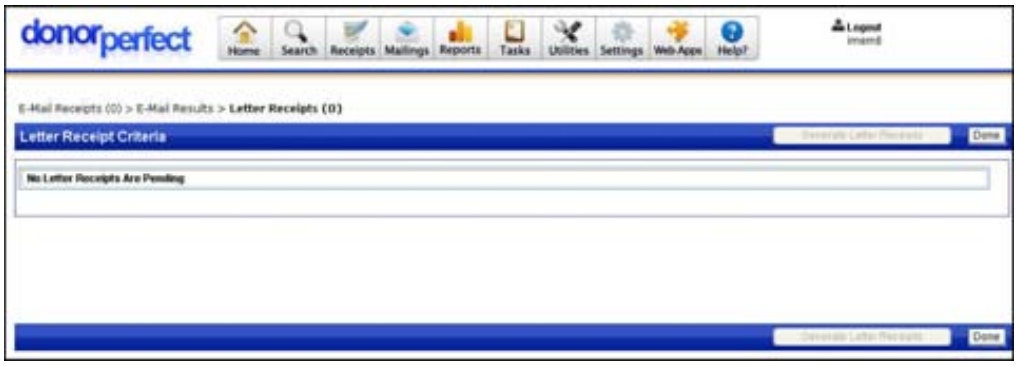
g. From the **Export Template** pull-down, choose the template you want to use for the mail merge data file. This template defines which fields will be included in the file you export. For details on export templates, see "Export Templates" on page 370.

3. Click the **Do** button. The File Download page appears.

> **Note:** Once this action has been submitted, receipt numbers are assigned to each gift.

4. Click the **Save** button, go to the location where you want to save the file, and then click **Save**. The file is created, and you can now use Word to customize the acknowledgement letters. See Appendix C for more information on mail merge functions.

5. Repeat steps 1-4 until mail merge data files have been created for all **TY #** types.



6. Click the **Done** button to finish generating letter receipts and return to the Receipt Options page.

Updating the Batch Number

After you've reviewed gifts and created acknowledgements/receipts, you need to update the batch number. This ensures that each gift in the batch you processed is not reprocessed again at a later time and that each gift batch has a unique number.

▶ To update the batch number

1. From the navigation bar, click on the **Receipts** button.
2. From the **Receipt/Acknowledgment Options** section at the bottom of the screen, select **Update Batch No**.

A message appears:

3. Click **Yes, Update Batch** to confirm. The batch number is increased by one.

Regenerating Receipts

If an official receipt is lost or destroyed, DonorPerfect Online can regenerate the gift receipt.

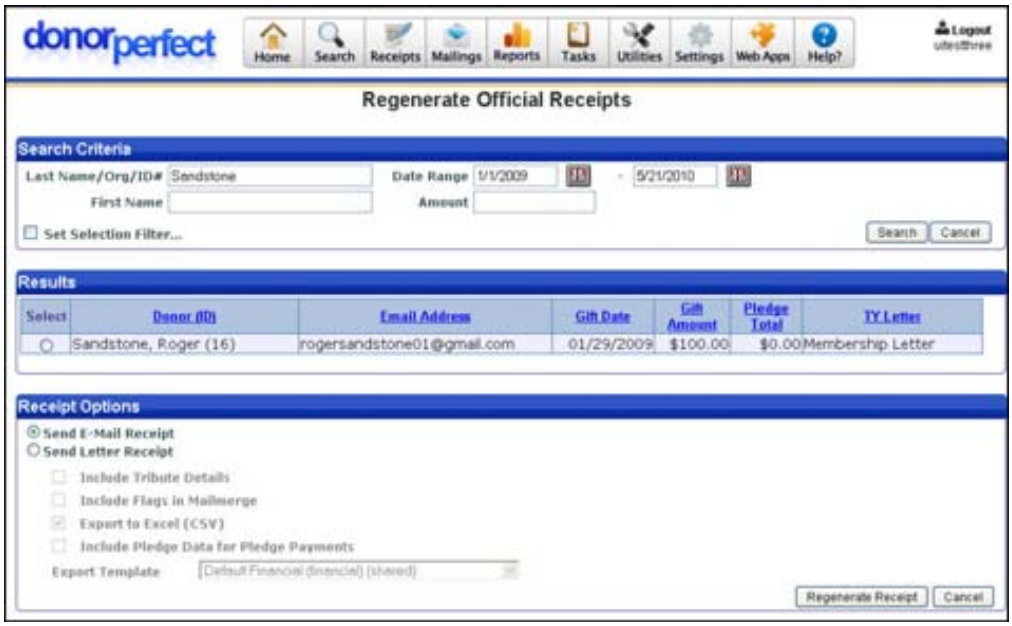
▶ To regenerate a gift receipt

1. From the navigation bar, click on the **Receipts** button.
2. From the **Receipt/Acknowledgment Options** section at the bottom of the screen, click on the **Regenerate Receipts** button.

The Regenerate Official Receipts screen appears:

3. Enter the search criteria for the receipt that you want to regenerate.

4. Click the **Search** button. The results of your search will appear below:



5. To regenerate a receipt as an email receipt:
   a. Select the receipt that you want to regenerate from the **Results** list.
   b. Under **Receipt Options**, select **Send Email Receipt**.
   c. Click the **Regenerate Receipt** button. A preview of the receipt will appear:

   d. If desired, you can enter additional text into the regenerated email receipt message by typing it into the Include Text field.

e. Click the **Send** button to send the regenerated email receipt, or the **Close** button to cancel sending the receipt. If you sent the receipt, you will see a message stating that it has been sent:

6. To regenerate a receipt as a printed letter:
   a. Select the receipt that you want to regenerate from the **Results** list.
   b. Under **Receipt Options**, select **Send Letter Receipt**.
   c. Set the remaining Letter Receipt options. See "Generating Mail Merge Data Files for Individual Letter Receipts" on page 104 for details on these options.
   d. From the **Export Template** pull-down, choose the template you want to use for the mail merge data file. This template defines which fields will be included in the file you export. For details on export templates, see "Export Templates" in the *DonorPerfect Online User Manual*.
   e. Click the **Regenerate Receipt** button. You will be prompted to save the mail merge data file.
7. When you are done regenerating receipts, click the **Cancel** button to return to the Receipts screen.

Running the Receipts and Acknowledgments Reports

See "Receipts and Acknowledgements Reports" on page 274 for details on running the reports on the Receipt Options screen.

5. Generating Mailings

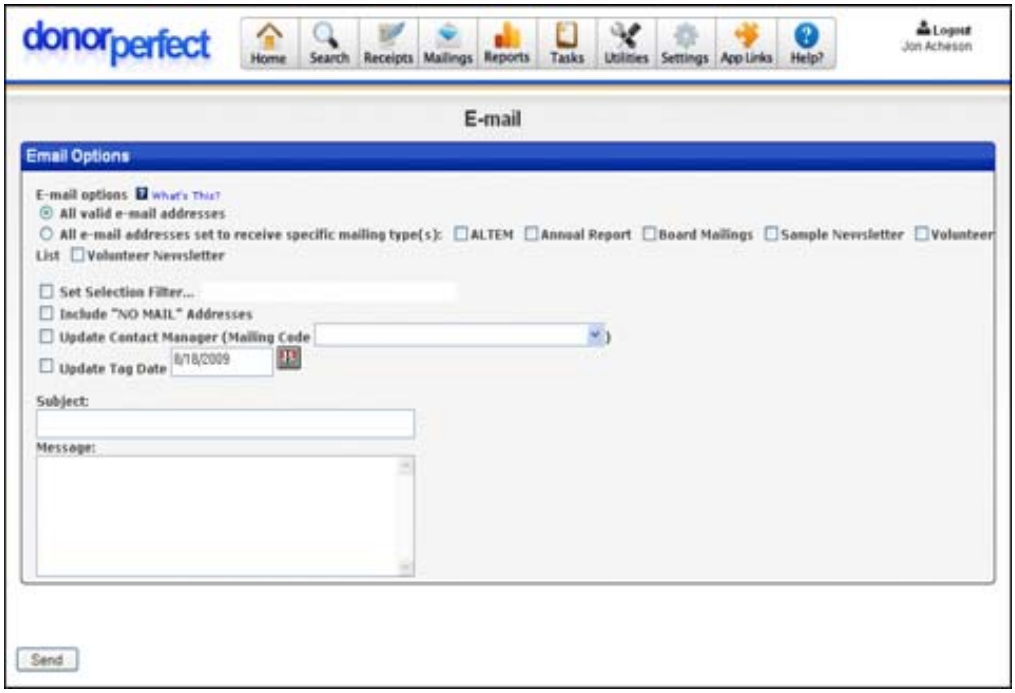
The **Mailings** menu allows you to send group emails and create mail merge data files. The following menu options are present

- Basic Email – Sends email to constituents. See page 115 for details.
- Constant Contact Email – Integrates DonorPerfect Online with Constant Contact for coordinated email campaigns. See page **Error! Bookmark not defined.**.
- Direct Mail Plans – Allows you to create mail merge files to give to a direct mail house. See "Direct Mail Plans" on page 142.
- Email Templates – Allow you to create templates for email messages to be sent out as part of email receipting and other processes. See page 146
- Mail Merge – Exports data files for mail merges. See page 153.
- Mail Merge Templates – Download templates for mail merge documents. See page 155.

Basic Email

▶ To send email

1. From the navigation bar, select **Mailings**, and then click **Email**. The Email screen appears.



2. Optional: **Set Selection Filter.** If you do not want to mail to all names in the database, check **Set Selection Filter.** See "Using Selection Filters" on page 159 for details.
3. Enter the **Subject** and **Message** of the email. Instead of typing the letter at this point, it is recommended you first type it into your word processor, and then paste it into the text box.
4. Click **Send**. It will send the emails with your email address based on the settings in User Parameters. Set this through **Utilities, Change Parameters, Mailings**.

Note: There is a limit to how many emails can be sent by our servers. If you are sending over 500 emails in one batch, please contact customer support.

Constant Contact Email

Introduction

Constant Contact Email provides a new level of integration between Constant Contact and DonorPerfect Online:

- Contacts from the Constant Contact website are automatically turned into constituent records in DonorPerfect Online.
- Mailing lists can be created in DonorPerfect Online and used to send out email campaigns in Constant Contact.
- Contact records are automatically created in DonorPerfect Online for each email you send out from Constant Contact. These contact records are then updated as the status of each email changes.
- The results of each email campaign can be monitored from either Constant Contact or DonorPerfect Online.
- New reports in DonorPerfect Online allow you to track the details for each email campaign, and the status of every email sent out through Constant Contact.

Note that while detailed campaign result information on the Constant Contact website expires after 85 days, contact records created in DonorPerfect Online will remain in the system indefinitely.

Workflow

In general, the workflow for Constant Contact Email is as follows:

1. Set up Constant Contact Email. See "Setup" on page 118.
2. Create and manage mailing lists in DonorPerfect Online using Constant Contact Email. These lists are automatically synched with the Constant Contact website. See "List Management" on page 125.

3. Create and send out email campaigns from the Constant Contact website using the mailing lists from DonorPerfect Online. See "Sending out Constant Contact Email Campaigns" on page 133.
4. Monitor the results of your email campaigns from either the Constant Contact website or DonorPerfect Online. See "Monitoring the Responses to Email Campaigns" on page 134.

Records Created Automatically by Constant Contact Email

The following types of DonorPerfect Online records are automatically generated by the Constant Contact Email module during its normal operation:

- If a person is listed as a Contact on the Constant Contact website, but is not found to have a constituent record in DonorPerfect Online, a constituent record will automatically be created in DonorPerfect Online based on the Contact record on the Constant Contact website.
- Once an email campaign is sent out from the Constant Contact website, contact records are automatically created in DonorPerfect Online for each of the emails that was sent out. The statuses of the contact records will be changed as the emails are opened, replied to, etc.

The **Create New Records in DPO** Sync Setting must be enabled in order for this to happen. See "Configuring Sync Settings" on page 123 for details.

Synchronization

Constant Contact Email has to synchronize its data with the Constant Contact website in order to keep itself up to date. This is done in two different ways:

- **Synchronizing Constant Contact Email module screens:** When you access Constant Contact Email, it synchs all of the data in the Campaign Results, List Management and Reports tabs with the Constant Contact website. As you investigate campaign results, edit mailing lists, and generate reports, the data for each screen is updated when the screen appears or refreshes. For instance, when you run a report, the data for that report will be synched with Constant Contact before being displayed, so that the report is always up to date.
- **Nightly Database Synchronization:** This is a far more comprehensive and time-consuming sync process that runs overnight at a specified time. The following actions are performed:
  - Constituent records are created in DonorPerfect Online for persons listed as contacts on the Constant Contact website, who are not found in the DonorPerfect Online system.
  - Contact records are created in DonorPerfect Online for emails that have been sent out from the Constant Contact website if they do not already exist.
  - Existing DonorPerfect Online contact records for Constant Contact Emails are updated with the current Email status.

- Dynamic Update mailing lists on the Constant Contact website are updated to match the current contents of the list in DonorPerfect Online.

Bulk Upload

When you create or edit a list containing more than 25 contact records, a Bulk Upload is used to transfer the contact records from DonorPerfect Online to the Constant Contact Website. The Bulk Upload method is more efficient when large numbers of records are being transferred.

Bulk Upload divides up the contact records into batches of up to 2,000 records. The batches are then transferred to the Constant Contact website one after another until all the records have been uploaded. This upload process happens in the background, so that you do not have to wait for it to complete.

Each batch of records sent by the Bulk Upload process will appear as a separate Activity in the Contacts: Activity page of the Constant Contact website.

The Nightly Database Sync also uses Bulk Upload to send records from DonorPerfect Online to the Constant Contact website, as it is more efficient than sending records one at a time.

Constant Contact Email and Backup/Restore

Lists that are created using Constant Contact Email are stored on the Constant Contact website. For this reason, they are not included in DonorPerfect Online system backups, and restoring from a backup will not restore a deleted email list.

Accessing Constant Contact Email

▶ To access Constant Contact Email

1. From the navigation bar, select **Mailings**, then **Constant Contact Email**. The Constant Contact Email screen appears:

Note: Because Constant Contact Email synchronizes its data with the Constant Contact website when it opens, there is a brief delay before the screen actually appears.

Accessing the Constant Contact Website from DonorPerfect Online

There are two ways to access the Constant Contact website directly from within DPO:

- If you are not in the Constant Contact Email screen, click on the **App Links** menu in the navigation bar, and select **Constant Contact**.
- If you are using Constant Contact Email, click on the **Launch Constant Contact** link at the top of the screen.

The Constant Contact website will open in a new browser window.

Constant Contact Email Setup

Before you can begin using Constant Contact Email, you will need to set up a Constant Contact account. You can create a new Constant Contact account from within DonorPerfect Online, or you can link to an existing Constant Contact account.

You can also set up field mapping, which will map up to 10 fields in the DonorPerfect Online database to the Custom Fields for your contacts on the Constant Contact website.

Lastly, you will need to configure the Sync Settings for Constant Contact, which control how the nightly sync process functions.

Important! You can really only use one Constant Contact account at a time. While you can set up more than one Constant Contact account in Constant Contact Email, only the newest account will be active. If you delete the newest account, the next most recent account will be reactivated.

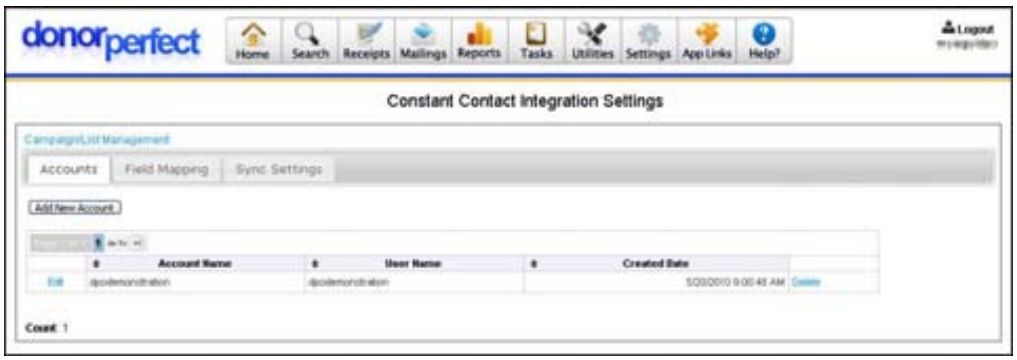
When you set up a Constant Contact account, it is set up for your entire DonorPerfect Online system. All user accounts on the system will use the same Constant Contact account. **You cannot use different Constant Contact accounts for different users on the same DonorPerfect Online system.**

Creating a Constant Contact Account from DonorPerfect Online

If you do not have an account with Constant Contact, you will need to create one before you can use Constant Contact Email. Fortunately, you can create a Constant Contact account without ever leaving DonorPerfect Online.

▶ To create a Constant Contact account from within DonorPerfect Online

1. Access Constant Contact Email from within DonorPerfect Online.
2. Click on the **Settings** link at the top of the screen. The Settings screen will appear:



3. Click the **Add New Account** button on the **Accounts** tab. You will see some information about Constant Contact, with a signup link at the bottom:

4. Click on the **Sign Up Today** link. A sign-up form will appear:

5. Enter the following information into the form:

First Name & Last Name	Your first and last name.
Organization Name	The name of your fundraising organization.
Phone Number	The phone number that you use for fundraising work.
Contact email	The email address that you use for fundraising work.
Website	The URL/web address of your fundraising organization's website.
User Name	The user name that you want to use for the Constant Contact website. User names must be at least 7 characters long.
Password	Enter the password that you want to use for the Constant Contact website. Passwords must be at least 7 characters long.
Retype password	Re-enter the password. It must match the entry in the **Password** field.
send welcome letter	Check to receive a welcome email when you create the account.

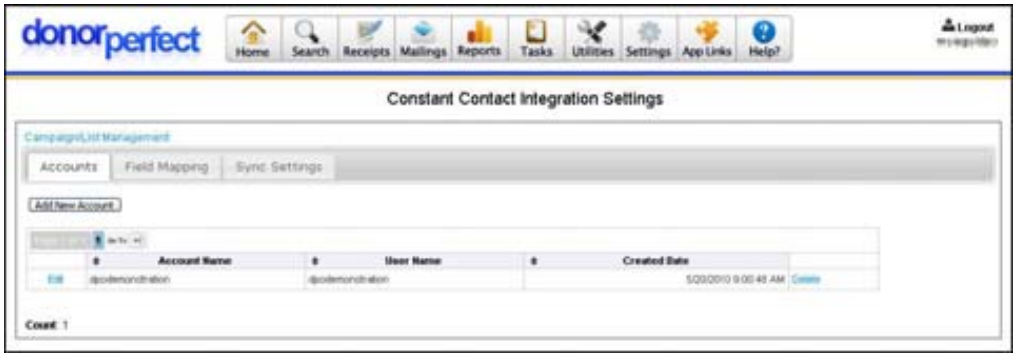
6. Click the **Submit** button. You will see a new page with additional information about Constant Contact. Click the **Get Started** link at the bottom of the page to return to the Constant Contact Email module.

Linking Existing Constant Contact Accounts into DonorPerfect Online

If you already have a Constant Contact account that you would like to use with the Constant Contact Email module, you can easily set up a link to that account in DonorPerfect Online.

▶ To link an existing Constant Contact account into DonorPerfect Online

1. From the navigation bar, select **Mailings**, then **Constant Contact Email**.
2. Click on the **Settings** link at the top of the screen. The Settings screen will appear:



3. Click the **Add New Account** button on the **Accounts** tab. You will see a small form titled **Already a Constant Contact customer?**

4. Enter the **User Name** and **Password** for your Constant Contact account into the form, and click on the **Get Started** button. You will see a new page with additional information about Constant Contact. Click the **Get Started** link at the bottom of the page to return to the Constant Contact Email screen.

Constant Contact Field Mapping

The **Field Mapping** tab allows you to specify up to 10 additional fields to be kept in synch between DonorPerfect Online and Constant Contact, in addition to the fields that are normally shared between the two applications.

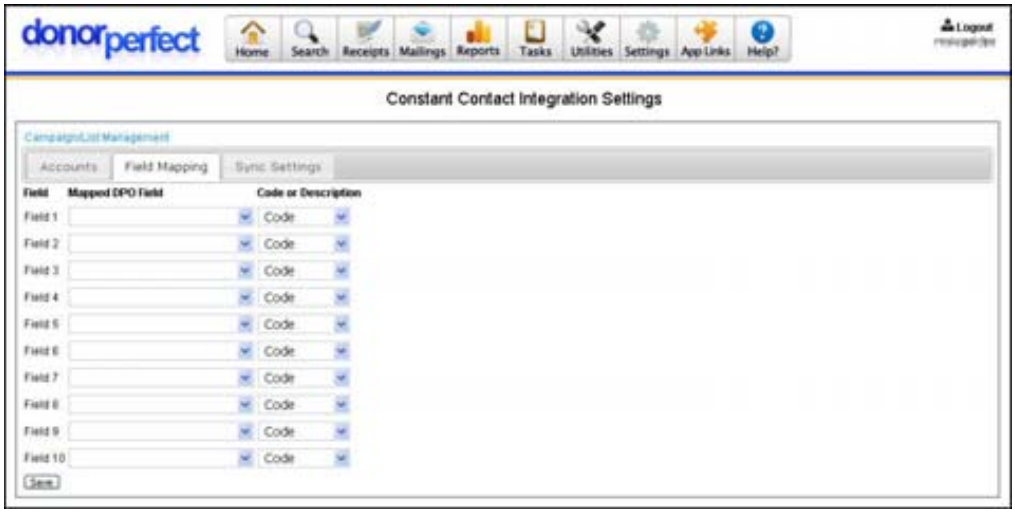
These fields map to the first 10 Custom Fields for each contact in the Constant Contact website. You can view them from Constant Contact by viewing the Details for a contact, then selecting the **Custom Field** tab.

Note: The names of the custom fields in the Constant Contact website will not change after you map a field from DonorPerfect Online to a custom field in Constant Contact. You must keep track of which field from DonorPerfect Online is mapped to each custom field in Custom Contact.

▶ To specify fields to synch between DonorPerfect Online and Constant Contact

1. From the navigation bar, select **Mailings**, then **Constant Contact Email**.

2. From the Constant Contact screen, click on the **Settings** link at the top of the screen.
3. In the Constant Contact Email Settings screen, select the **Field Mapping** tab. The Field Mapping screen appears:

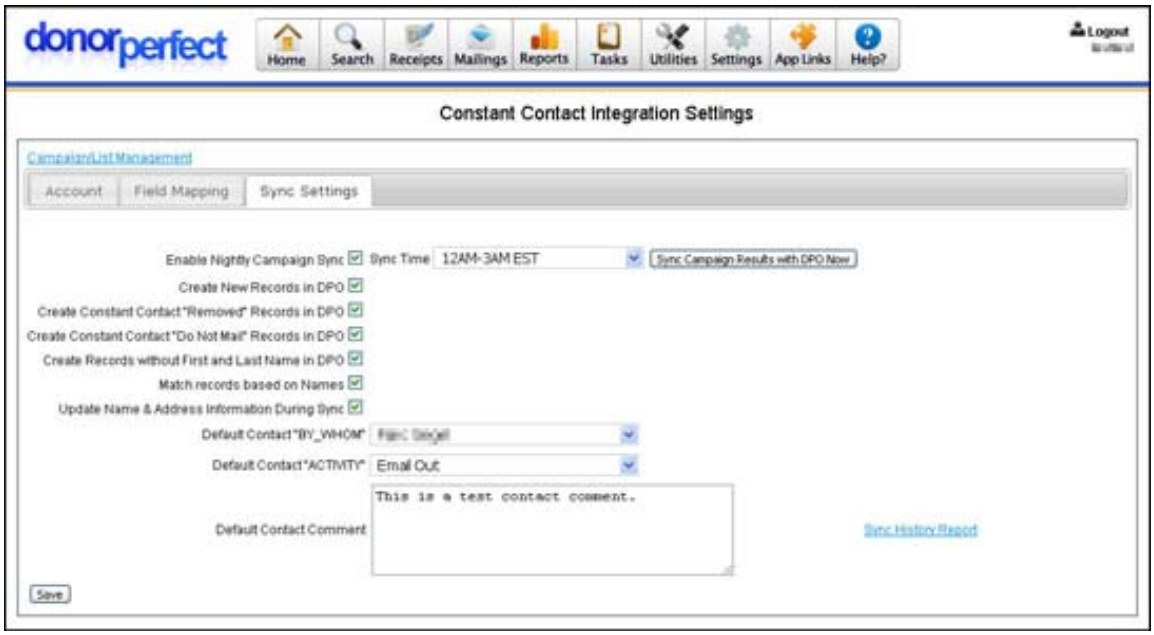


4. For each field you want to sync with Constant Contact:
   a. Select the field from the **Mapped DPO** field.
   b. Set **Code or Description** to one of the following:
      - **Code** – The code data from the field will be synched with Constant Contact.
      - **Description** – The descriptions for each field value will by synched, instead of the code.
5. Click the **Save** button to save your settings.

Important! Field mappings only update information in one direction: from DonorPerfect Online to Constant Contact. If you need to edit the information in a mapped field, you should always edit the information in DonorPerfect Online, never in Constant Contact.

Configuring Sync Settings

The Sync Settings tab of the Constant Contact Email Settings screen allows you to select options related to the Nightly Database Synchronization.



▶ To configure settings for the nightly Campaign Sync

1. From the navigation bar, select **Mailings**, then **Constant Contact Email**.
2. From the Constant Contact screen, click on the **Settings** link at the top of the screen.
3. In the Constant Contact Email Settings screen, select the **Sync Settings** tab. The Sync Settings screen appears (see above).
4. The following settings are available:

Enable Nightly Campaign Sync	Check to enable Nightly Database Synchronization to be performed every night.
Sync Time	Set the time at which you want the Nightly Database Synchronization to be performed.
Create New Records in DPO	If checked, constituent records will be created during the Nightly Database Synchronization for all new contacts on the Constant Contact website that do not already exist in your DonorPerfect Online system. If unchecked, new contacts on the Constant Contact website will not be synced over to DonorPerfect Online.
Create Constant Contact "Removed" Records in DPO	If checked, constituent records will be created during the Nightly Database Synchronization for records that are marked as "Removed" on the Constant Contact website. If unchecked, records that are marked as "Removed" will be ignored by Constant Contact Email. This option is only relevant when Create New Records in DPO is checked.

Create Constant Contact "Do Not Mail" Records in DPO	If checked, constituent records will be created during the Nightly Database Synchronization for records that are marked as "Do Not Mail" on the Constant Contact website. If unchecked, records that are marked as "Do Not Mail" will be ignored by Constant Contact Email. This option is only relevant when Create New Records in DPO is checked.
Create Records without First and Last Name in DPO	If checked, Constant Contact records that do not have a first and last name listed (just an email address) will have constituent records created for them in DonorPerfect Online. The Last Name will be set to the email address of the record, as Last Name is a required field. If unchecked, constituent records will not be created for that type of record.
Match records based on Names	If checked, Constant Contact Email will match records based on first name, last name, and ZIP code if no match is found using email addresses. If unchecked, records will only be matched using email addresses.
Update Name & Address Information During Sync	If checked, Constant Contact Email will update all contact data (first name, last name, address, email) as part of every Nightly Database Synchronization. If unchecked, DPO records are not updated after they are created, except for their Email Status.
Default Contact "BY_WHOM"	The default contact person from your organization who will be assigned to contact records created by Constant Contact Email.
Default Contact "ACTIVITY"	The default activity code that will be assigned to contact records created by Constant Contact Email.
Default Contact Comment	A default comment that will be entered for contact records created by Constant Contact Email. For instance, "Created by Constant Contact Email module."

5. When finished, click the **Save** button to save your changes.

List Management

The List Management tab allows you to create mailing lists for your Constant Contact email campaigns. Lists can be created using two different methods:

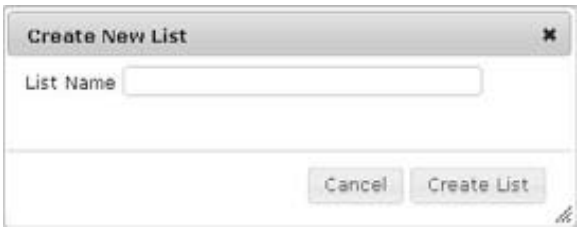
- **Manual Update** – This method allows you to search for constituents and manually add them to the list one at a time or in groups.
- **Dynamic Update** – This method uses a selection filter to select which constituents appear on the list. This allows names to be automatically added to the list, or removed from the list, as circumstances change.

Important! If a list contains more than 5,000 contact records, only the first 5,000 records will be displayed in the List Management tab. This is done to prevent browsers from timing out while the records are downloaded. You can manage all of the contact records in a list with more than 5,000 records using the Constant Contact website.

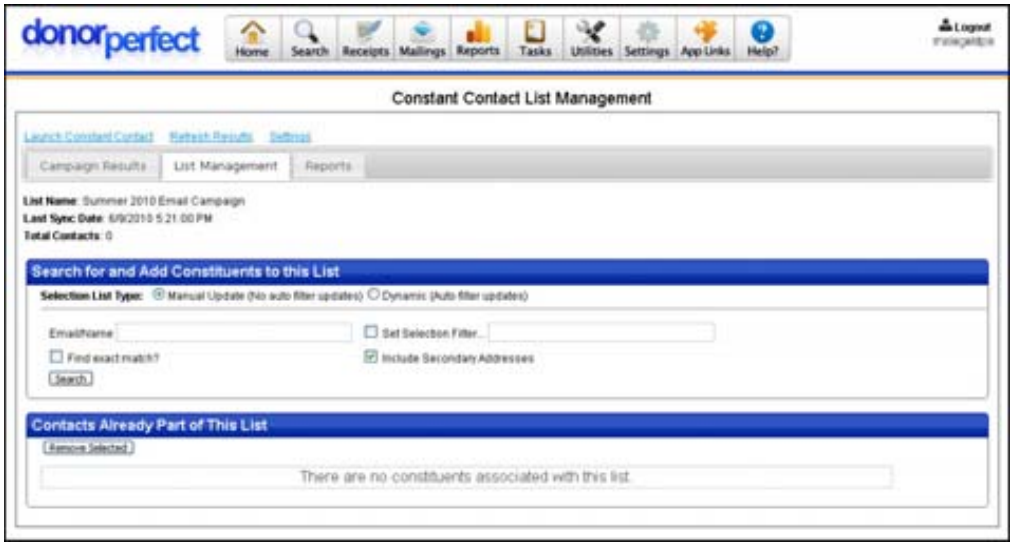
Creating a Manual List

▶ To create a manual list

1. From the navigation bar, select **Mailings**, then **Constant Contact Email**.
2. From the Constant Contact screen, click on the **List Management** tab at the top of the screen.
3. Click the **Add New List** button. A pop-up dialog will appear, prompting you to enter a name for the new list:



4. Enter the name for the list in the **List Name** field.
5. Click the **Create List** button. The Constant Contact List Management screen appears:



6. Make sure that **Selection List Type** under **Search For and Add Constituents to this List** is set to **Manual Update (No auto filter updates)**.
7. Enter the search terms and options in the **Search For and Add Constituents to this List** section:

   a. Enter search terms in the **Email**, **First Name**, and **Last Name** fields that will match the constituent records you want to add to the list.

   By default, the software will do a partial match search on these terms, meaning that a record will count as a match if the search term matches all or part of the field. For instance, a partial match search for **Sand** in the **Last Name** field might turn up "James Sand," but would also match "Roger Sandstone."

See **Find Exact Match**, below, for details on doing an exact match.

> Tip: Since all email addresses use an @ character to indicate the email server associated with the address, you can type an @ character in the **Email** field and find all constituent records that have an email address.

b. Check **Set Selection Filter** to apply a selection filter to further narrow your search. See "Using Selection Filters" on page 159 for details on creating a selection filter.

c. Check **Include Secondary Addresses** to search secondary addresses in addition to the primary address.

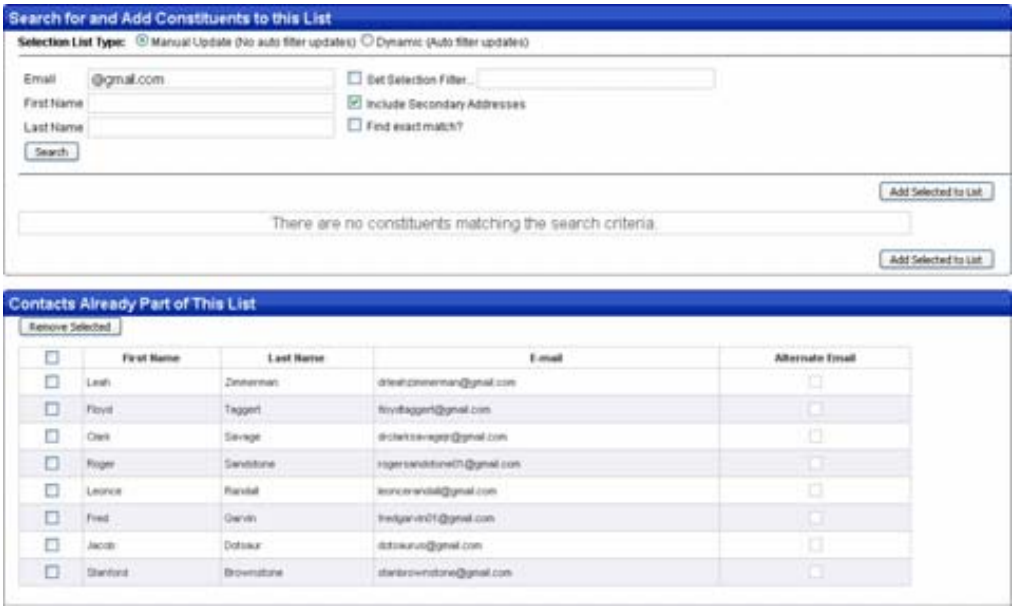
d. Check **Find Exact Match** to force the search to return only those records which exactly match the search terms.

8. Click the **Search** button to run the search with your current search terms and options. The matching records will appear below the search criteria:

9. To add one or more constituent records from the search results to your list:

a. Check the box to the left of the constituent record to select it, or check the box in the column heading to check and uncheck all records.

b. Click the **Add Selected to List** button to add the selected records to the list. They will disappear from the **Search For and Add Constituents to This List** section, and appear in the **Contacts Already Part of This List** section.



10. To remove one or more constituent records from the list:

    a. Check the box to the left of the constituent record to select it, or check the box in the column heading to check and uncheck all records.

    b. Click the **Remove Selected** button. The selected records will disappear from the **Contacts Already Part of This List** section, and reappear in the **Search For and Add Constituents to This List** section.

11. When finished editing the list, click the **List Management** tab to return to the List Management screen.

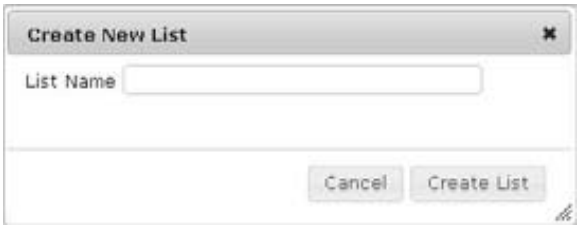
Creating a Dynamic List

A dynamic list uses a selection filter to select which constituents appear in the list. This means that the list will automatically update to changing conditions, but it also means that constituents may drop off the list as their conditions change.

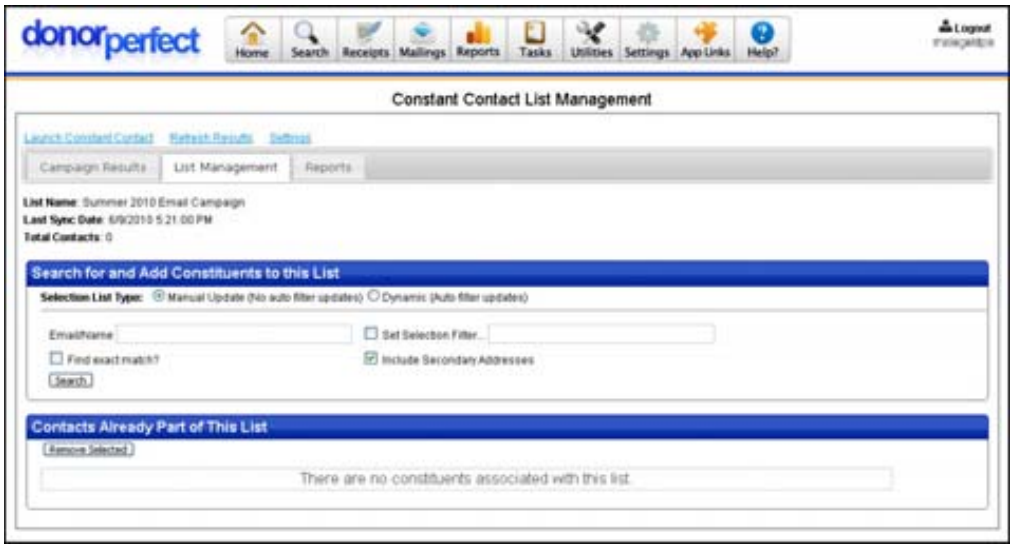
Tip: For instance, you could set up a selection filter to select all donors who are at a given membership level, so that you can send out an email tailored for that level of membership. This would allow you to set up separate dynamic lists for the "President's Club" versus a lower level of membership.

▶ To create a dynamic list

1. From the navigation bar, select **Mailings**, then **Constant Contact Email**.
2. From the Constant Contact screen, click on the **List Management** tab at the top of the screen.
3. Click the **Add New List** button. A pop-up dialog will appear, prompting you to enter a name for the new list:



4. Enter the name for the list in the **List Name** field.
5. Click the **Create List** button. The Constant Contact List Management screen appears:

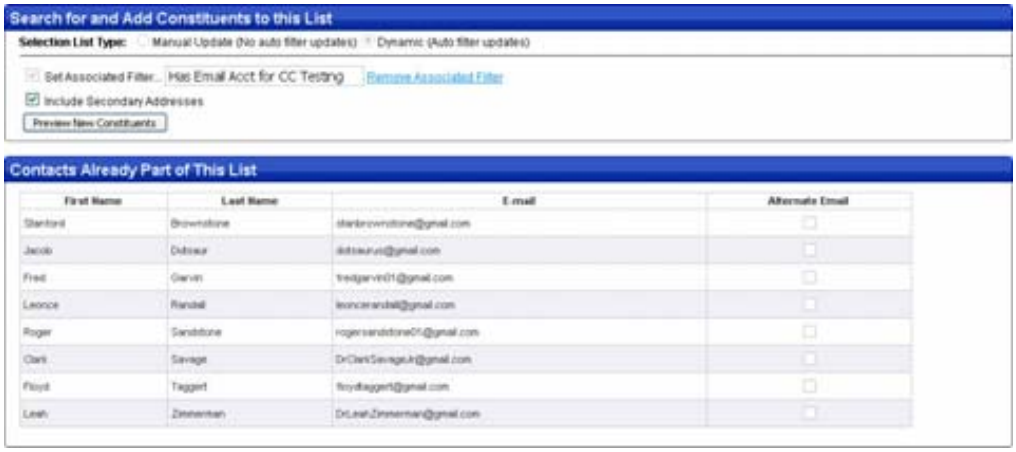


6. Under **Search For and Add Constituents to this List**, set **Selection List Type** to **Dynamic (auto filter updates)**. The screen will update to display a different set of fields in that section:

7. Check **Set Associated Filter** to create the selection filter that will be used to dynamically create the list of names.

   We recommend you give the filter a name and store it for reuse. It may also be convenient to create a new filter folder to store your dynamic list filters in. See "Using Selection Filters" on page 159 for details on creating and maintaining selection filters.

8. Check **Include Secondary Addresses** to search secondary addresses in addition to the primary address.
9. Click the **Preview New Constituents** button to see which records are selected by the current filter. The records will appear below in the **Contacts Already Part of this List** area.



Important! If a dynamic list contains more than 5,000 contact records, only the first 5,000 records will be displayed. This is done to prevent browsers from timing out while the records are downloaded. You can manage all of the contact records in a list with more than 5,000 records using the Constant Contact website.

Editing a List

Once you have created a manual or dynamic list, the Edit function allows you to go back into the list and edit certain aspects of the list. You cannot rename the list, but you can edit the contents of the list. You can also change a manual list into a dynamic list, and vice versa.

Important! If a list contains more than 5,000 contact records, only the first 5,000 records will be displayed. This is done to prevent browsers from timing out while the records are downloaded. You can manage all of the contact records in a list with more than 5,000 records using the Constant Contact website.

Editing a Manual List

The Edit function allows you to edit the contents of a manual list, but does not allow you to rename the list.

▶ To edit a manual list

1. From the Constant Contact screen, click on the **List Management** tab at the top of the screen.
2. Click on the **Edit** link to the left of the list entry in the List Management screen. A screen similar to the one you used to create the list will appear.
3. You can search for constituents, and add or subtract them from the list, in the same way that the list was originally created (see "Creating a Manual List" on page 125 for details).
4. When finished editing the list, click the **List Management** tab to return to the List Management screen.

Editing a Dynamic List

The Edit function allows you to replace the selection filter used to generate a dynamic list, but does not allow you to rename the list.

▶ To edit a dynamic list

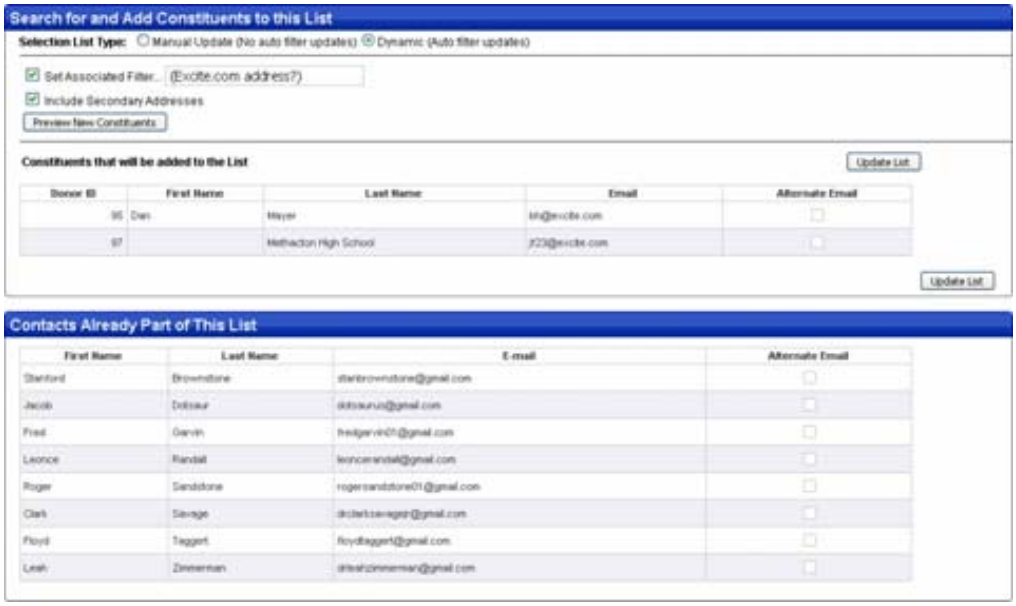
1. From the Constant Contact screen, click on the **List Management** tab at the top of the screen.
2. Click on the **Edit** link to the left of the list entry in the List Management screen. A screen similar to the one you used to create the list will appear.
3. Click the **Remove Associated Filter** link next to the selection filter field. This will clear the selection filter field and uncheck **Set Associated Filter**.
4. Check **Set Associated Filter** to select a different selection filter for the dynamic list, or edit the filter you were previously using. See "Using Selection Filters" on page 159 for details.
5. If desired, check **Include Secondary Addresses** to search secondary addresses in addition to the primary address.
6. When finished editing the list, click the **List Management** tab to return to the List Management screen.

Changing a Manual List into a Dynamic List

When editing a manual list, it is possible to change the list from a manual list to a dynamic list. If you do this, the manually-selected contents of the list will be replaced by the constituent records selected by the new selection filter.

▶ To change a manual list into a dynamic list

1. From the Constant Contact screen, click on the **List Management** tab at the top of the screen.
2. Click on the **Edit** link to the left of the list entry in the List Management screen. A screen similar to the one you used to create the list will appear.
3. Set **Selection List Type** to **Dynamic (Auto filter updates)**.
4. Check **Set Associated Filter** to create the selection filter that will be used to dynamically create the list of names. We recommend you give the filter a name and store it for reuse. It may also be convenient to create a new filter folder to store your dynamic list filters in. See "Using Selection Filters" on page 159 for details on creating and maintaining selection filters.
5. Click the **Preview New Constituents** button to see which records are selected by the current filter. They will appear at the bottom of the **Search for and Add Constituents to this List** section of the screen:



6. Click the **Update List** button. The list of manual contacts will be replaced by the set of constituent records that was selected by the current filter.
7. Click the **List Management** tab to return to the List Management screen.

Changing a Dynamic List into a Manual List

When editing a dynamic list, it is possible to change the list from a dynamic list to a manual list. If you do this, the current dynamically-selected contents of the list will become the contents of the manual list.

▶ To change a dynamic list into a manual list

1. From the Constant Contact screen, click on the **List Management** tab at the top of the screen.
2. Click on the **Edit** link to the left of the list entry in the List Management screen. A screen similar to the one you used to create the list will appear.
3. Click the **Remove Associated Filter** link next to the selection filter field. This will clear the selection filter field and uncheck **Set Associated Filter**.
4. Set **Selection List Type** to **Manual Update (No auto filter updates)**.
5. If desired, edit the contents of the list (see "Creating a Manual List" on page 125 for details).
6. Click the **List Management** tab to return to the List Management screen.

Deleting a List

The List Management screen allows you to delete any list that you have created.

Warning! Once deleted, the list cannot be recovered. Doing a system restore will not restore it. A deleted list can only be recreated by repeating the same steps used to create it initially.

▶ To delete a list

1. From the Constant Contact screen, click on the **List Management** tab at the top of the screen.
2. Click on the **Delete** link to the right of the list entry in the List Management screen. A confirmation message box appears:

3. Click the **OK** button to delete the list. The list will be deleted in DonorPerfect Online, and the system will immediately sync with Constant Contact to delete it there too.

Editing Email Addresses

Because the email address is the primary index used to match up DonorPerfect Online constituent records with Constant Contact, editing the email address on either DonorPerfect Online or Constant Contact is problematic. The records on the two sites will not match up if one of their email addresses has been changed to a different value.

The best practice is to edit the email address on both the DonorPerfect Online and Constant Contact websites. That way, the records on each site will both have the new email address, and the Constant Contact Email module will be able to match them together.

Sending out Constant Contact Email Campaigns

Once you have set up manual and dynamic lists of email addresses, you can then use those lists to begin sending out email campaigns from the Constant Contact website.

For details on connecting to the Constant Contact website from DonorPerfect Online, see "Accessing the Constant Contact Website from DonorPerfect Online" on page 118.

Creating and Sending Email Messages

Email messages are created and sent out using the "Create an Email" feature of the Constant Contact website. Emails can be created using one of the available templates, or you can create a message from scratch. You can then edit the message to fit your exact needs.

Once the email message is ready, you can then schedule a time for Constant Contact to send out the email, or you can send the message immediately.

Training presentations and FAQs for this feature are available on Constant Contact's website. See the **Create an Email** link on your Constant Contact home page for more information. You can also download a PDF manual on "Getting Started with Email

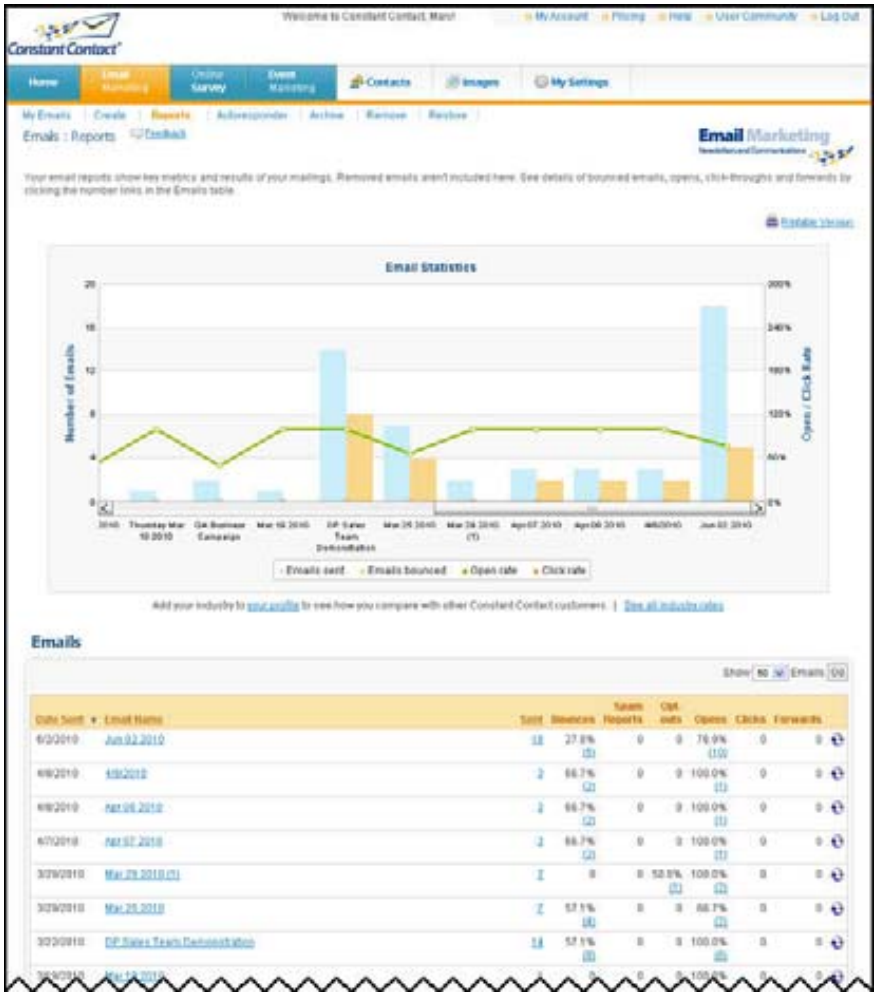
Marketing" from the Constant Contact website (click on the **Help** link at the top of your Constant Contact home page, then select the **Education & Training** tab and click on **Product Tutorials and Guides**).

Monitoring the Responses to Email Campaigns

Once you have sent out an email campaign, you will need to monitor its results. This can be done from either the Constant Contact website or from within the DonorPerfect Online Constant Contact Email module.

Monitoring Responses from the Constant Contact Website

For a quick high-level overview of the results from your email campaigns, select the **Email Marketing** tab at the top of your Constant Contact home page, and then click on **Reports** in the row of links below the tabs. The Reports page will appear, displaying a graph and basic statistics for your recent email campaigns:



Training presentations and FAQs for this feature are available on Constant Contact's website. You can also download a PDF manual on "Measuring & Improving Email Results" from the Constant Contact website (click on the **Help** link at the top of your Constant

Contact home page, then select the **Education & Training** tab and click on **Product Tutorials and Guides**).

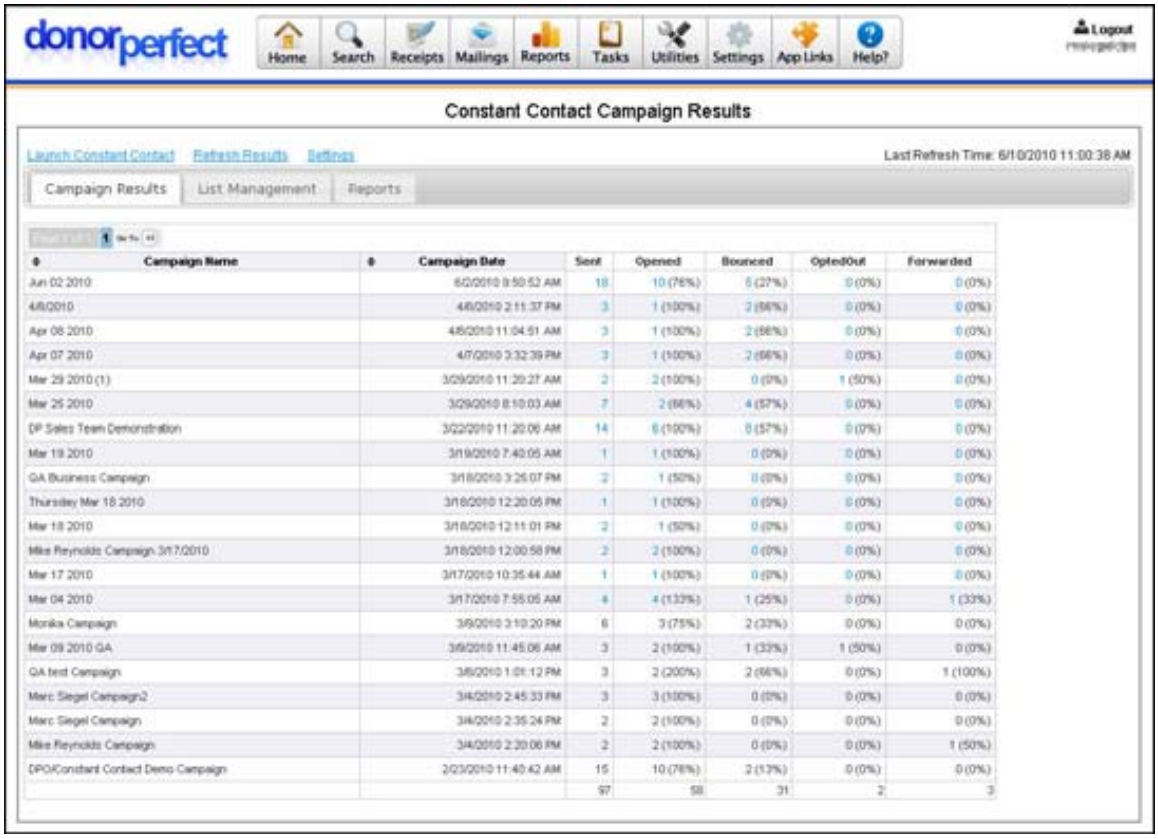
Monitoring Responses from DonorPerfect Online

In general, it's best to monitor the responses to your email campaigns from the Campaign Results tab of the Constant Contact Email module.

You can also use custom reports to display the results of email campaigns. This approach also allows you to view details of campaigns that are older than 85 days.

Monitoring Responses from the Campaign Results Tab

To monitor the results of your email campaigns from within the DonorPerfect Online Constant Contact Email module, simply select the **Campaign Results** tab.



The Campaign Results tab lists the basic statistics for each campaign:

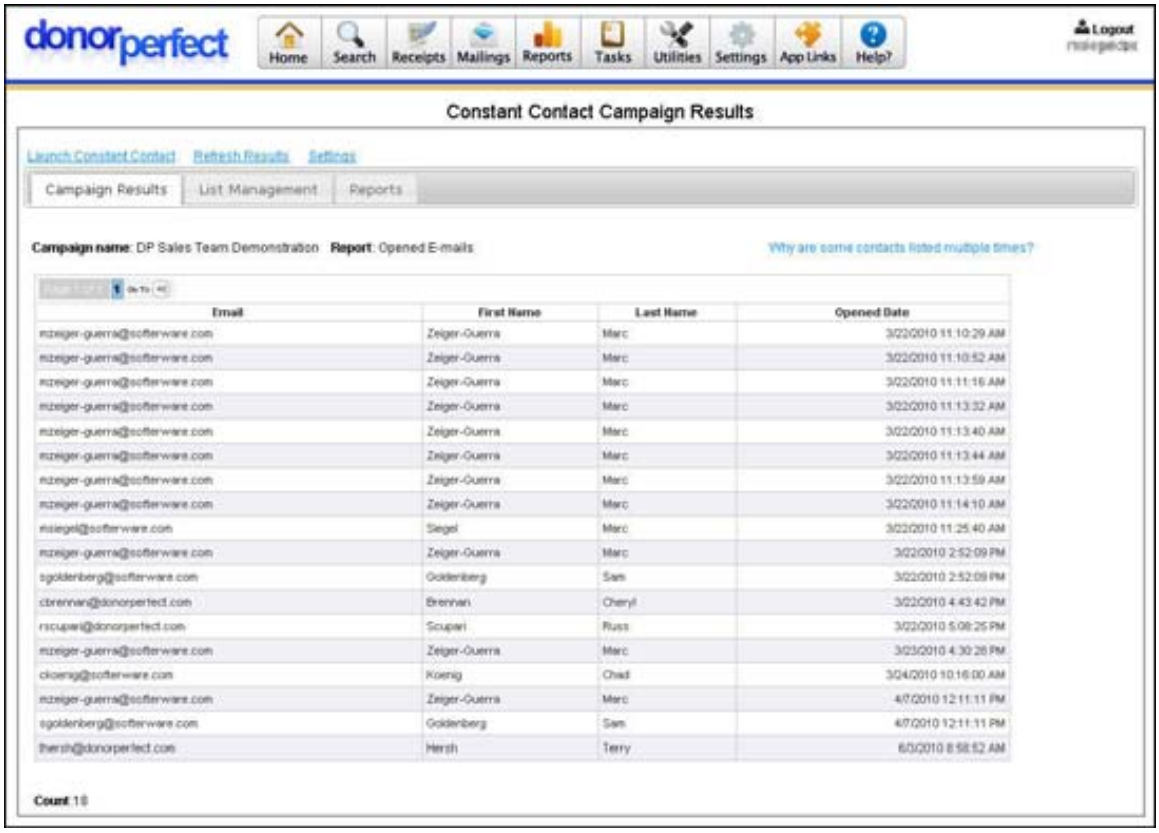
Campaign Name	The name of the email campaign as set up on the Constant Contact website.
Campaign Date	The date on which the email campaign was sent out.
Sent	The total number of emails sent out for the email campaign.
Opened	The number of emails that were opened by the recipients. This number is also listed as a percentage of the total number of emails.
Bounced	The number of emails that were not received by their intended recipients. This number is

also listed as a percentage of the total number of emails.

Opted Out — The number of emails that were not received because the recipients have put themselves on your Constant Contact Do Not Mail list. This number is also listed as a percentage of the total number of emails.

Forwarded — The number of emails that were forwarded to another email address. This number is also listed as a percentage of the total number of emails.

Clicking on any of the numbers will open up a new screen that lists details for all of the emails that make up that number:



Note: The actual number of emails listed in the details screen will tend to be larger than the number listed on the main **Campaign Results** tab. This is because the number on the main screen is based on the number of unique email addresses, while the details screen lists every event for every address.

If an email listing is older than 85 days, detailed information will no longer be available and the hyperlinks will be removed from the numbers in the main **Campaign Results** tab. The contact records will remain in DPO indefinitely, however, and you can use custom reports to view that information (see next section).

Monitoring Responses Using the Custom Report Writer

Using the optional Custom Report Writer feature of DPO, it is possible to create reports that will display the status and details of every email from a given email campaign. This is particularly useful when the email campaign is old enough that the details are no longer

available from the Constant Contact website or the **Campaign Results** tab of Constant Contact Email.

To do this you will need to create two things: the report itself, and a selection filter that will allow only the contact records for your desired email campaign to display.

Note: The Custom Report Writer is an optional feature of DonorPerfect Online, and must be purchased separately from the main application. Please contact your SofterWare support representative for more information on purchasing the Custom Report Writer.

▶ To create a custom report to display the details of an email campaign

1. From the navigation bar, click on the **Reports** menu, and select **Custom Report Writer**.
2. In the Custom Report Writer screen, click the **Create New Report** button.
3. In Step 1 of the Create New Report wizard, select **Contact Transactions** from the list of base records to report on, and click the **Next** button.
4. In Step 2, select **Email Campaign Status** as the field to group on, and click the **Next** button.
5. In Step 3, we recommend that you select the following fields to display in the report: **First Name**, **Last Name**, **Email**, and **Email Bounce Reason**, and then click the **Next** button.
6. In Step 4, we recommend that you select **Last Name** and **First Name** to sort by, and then click the **Next** button.
7. In Step 5, edit **Email Bounce Reas** to **Email Bounce Rsn.** and then click the **Next** button.
8. In Step 6, give your report a short descriptive name, such as **CC Campaign Detail Report**, then click the **Finish!** button. Your report will appear in the list of reports in the Custom Report Writer screen.

▶ To create a selection filter that allows only the contact records from a single email campaign to display

1. In the Constant Contact Email Campaign Results tab, copy the exact name of the email campaign for which you want to view contact records into the Windows clipboard.
2. From the navigation bar, click on the **Reports** menu, and select **Custom Report Writer**.
3. In the Custom Report Writer screen, check the **Set Selection Filter** option.
4. In the Choose a selection filter screen, click the **Build New Filter** button.
5. In the Enter Filter Criteria screen, carry out the following steps:
   a. In Section 1, **Select Screen/Table to choose fields from**, select **Contact**.

b. In Section 2, **Select field to compare**, select **EM_CAMPAIGN (Email Campaign)**.

c. In Section 3, **Select comparison operator**, select **= exactly equal to**.

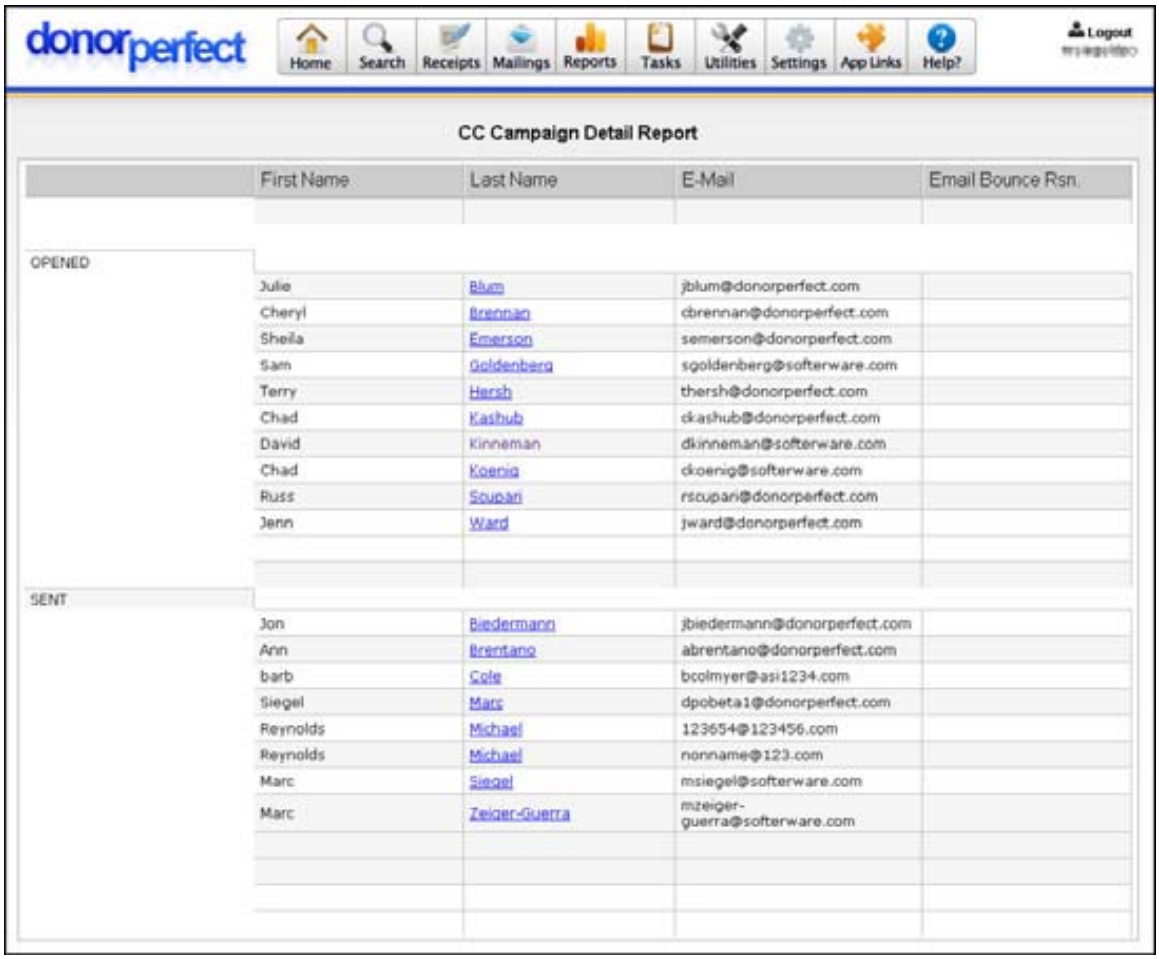
d. In Section 4, paste the name of the email campaign from the Windows clipboard into the field provided.

e. Click the **Done** button in Section 5 of the screen.

6. If desired, give the filter a name and share it across all users. This is particularly helpful if you will be looking up the status of the contacts for this email campaign a number of times. If you have a filter folder set up for Constant Contact Email, save the filter there.

7. Click the **Done** button.

Once you have created the custom report and the filter, you can run the report, and see the contacts for each email grouped by email status:

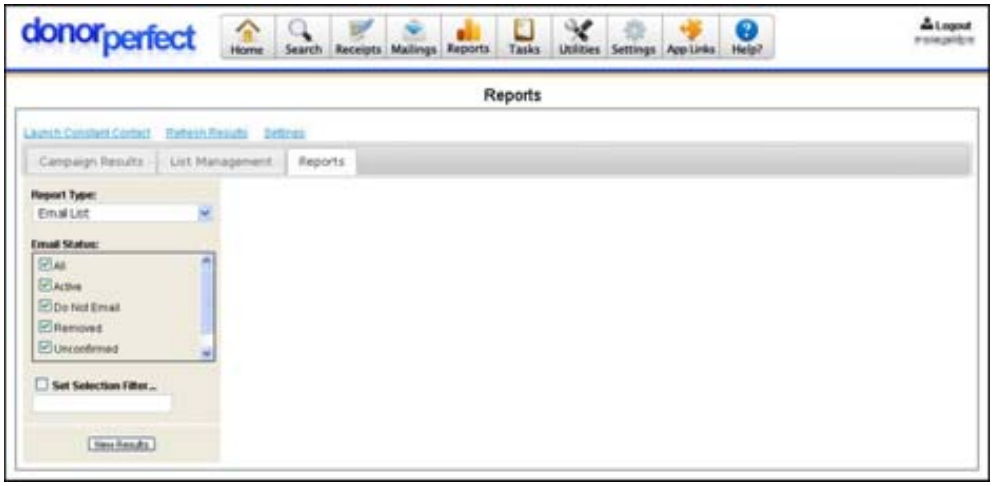


Using Constant Contact Email Reports

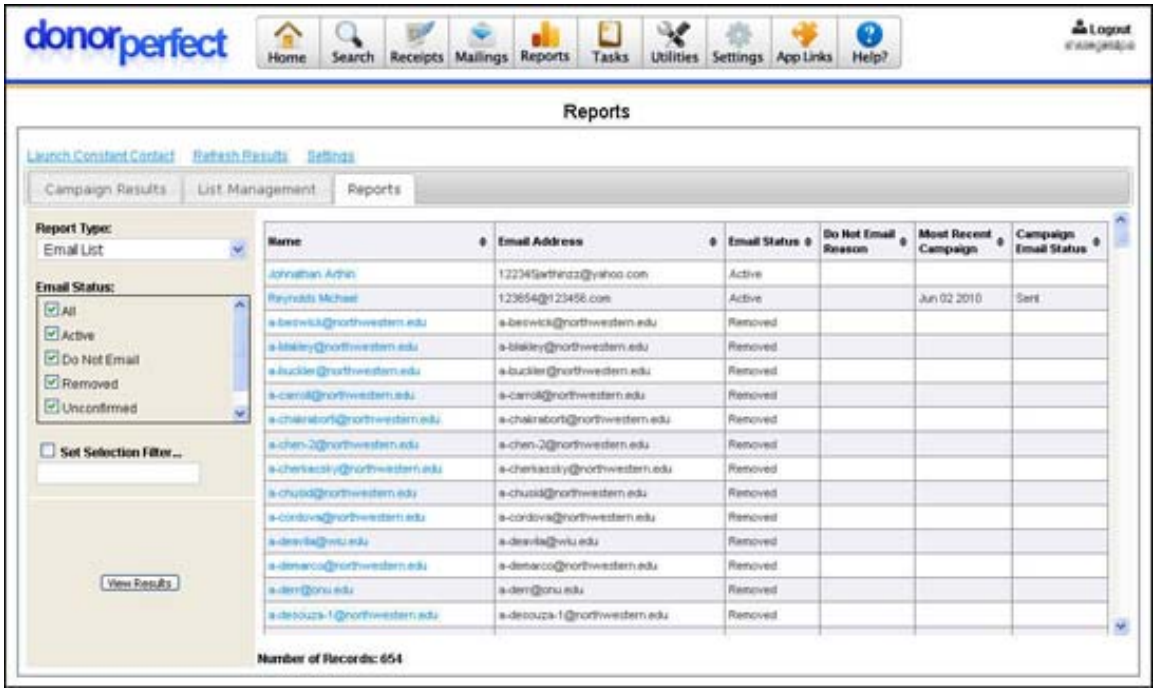
The reports provided with Constant Contact Email help you display information on the email addresses and campaigns that have been set up in your system.

▶ To access the Constant Contact Email reports

1. From the navigation bar, click on the **Mailings** menu, and then select **Constant Contact Email**. The Constant Contact Campaign Results screen appears.
2. Click on the **Reports** tab. The Reports screen appears:



Email List Report



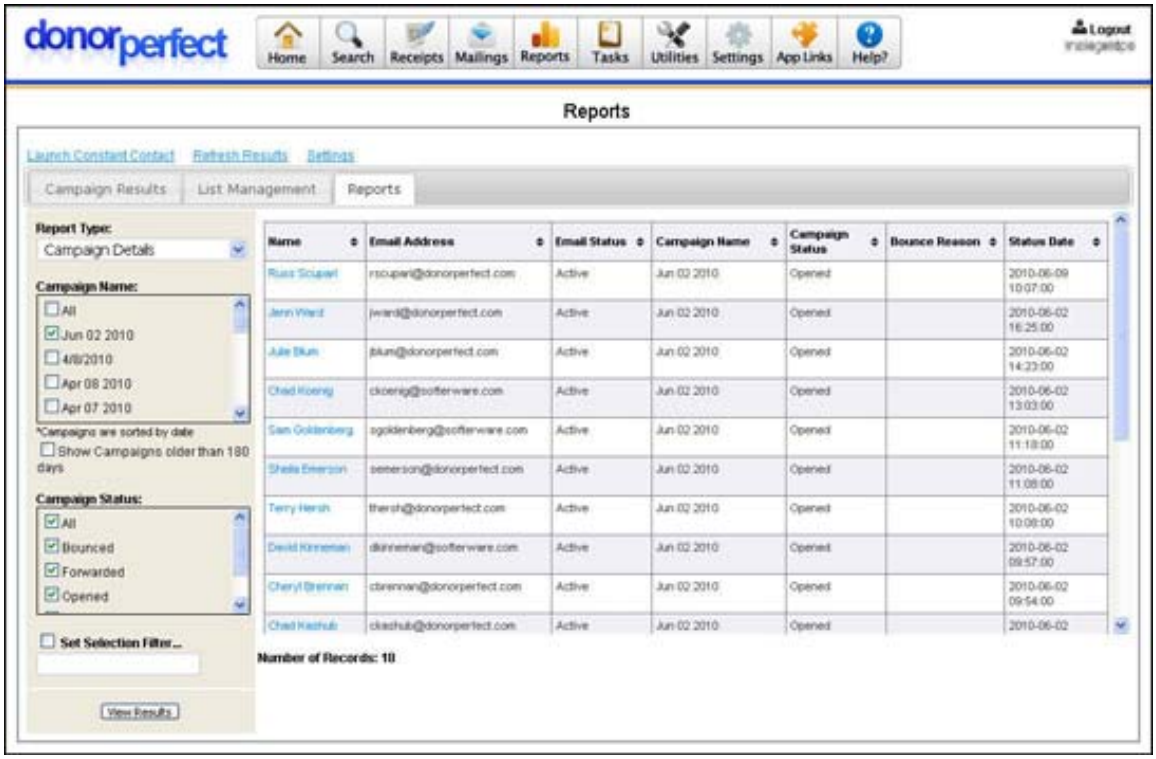
The Email List report lists each of the individual email messages that have been sent out using Constant Contact. All of the emails sent out as part of a campaign are listed separately.

▶ To run the Email List report

1. In the **Reports** tab of the Constant Contact Email screen, set **Report Type** to **Email List**.

2. In the **Email Status** box, check the email statuses that you want to include in the report, and uncheck those options you want to exclude from the report.
3. If desired, you can check **Set Selection Filter** to apply a selection filter to the output of the report. Records that do not pass the selection criteria will not appear in the report. See "Using Selection Filters" on page 159 for details.
4. Click the **View Results** button to display the contents of the report in the space to the right of the report options.

Campaign Details Report



The Campaign Details report lists the status of each email that you sent out through Constant Contact as part of an email campaign.

▶ To run the Campaign Details report

1. In the **Reports** tab of the Constant Contact Email screen, set **Report Type** to **Campaign Details**.
2. In the **Campaign Name** box, check the campaigns that you want to display in the report, or check **All** to display all campaigns in the system.
3. If you want to display results from campaigns that are older than 180 days, check the box marked **Show Campaigns older than 180 days**.
4. In the **Campaign Status** box, check the email statuses that you want to include in the report, and uncheck those statuses you want to exclude from the report. Check **All** to include all statuses in the report.

5. If desired, you can check **Set Selection Filter** to apply a selection filter to the output of the report. Records that do not pass the selection criteria will not appear in the report. See "Using Selection Filters" on page 159 for details.
6. Click the **View Results** button to display the contents of the report in the space to the right of the report options.

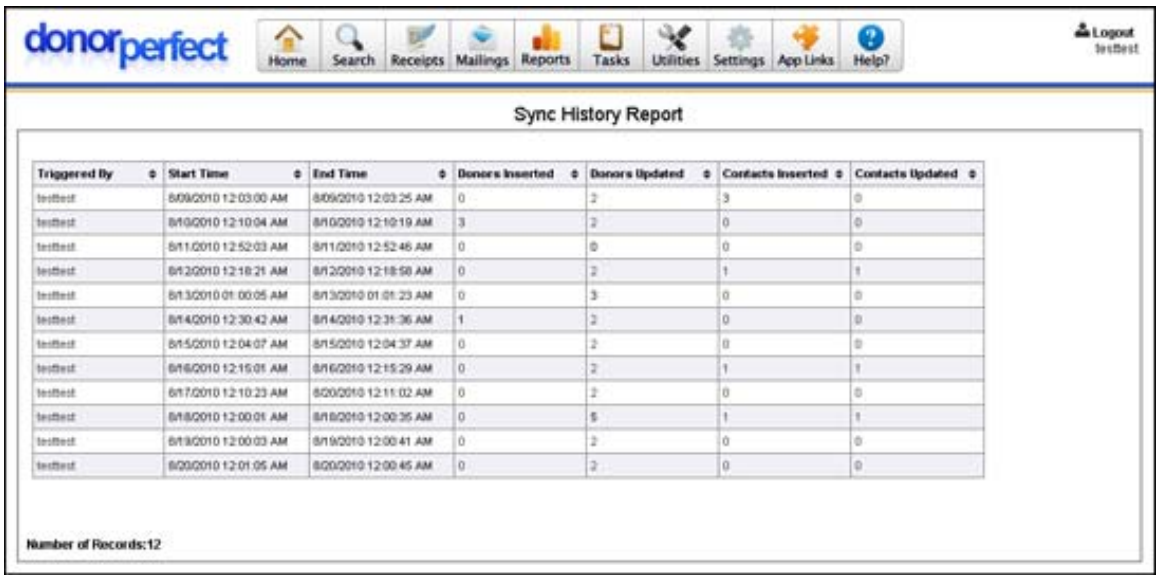
Manually Triggering a Nightly Database Sync

If need be, you can force a Nightly Database Synchronization to occur at any time.

▶ To manually trigger a Nightly Database Synchronization

1. From the navigation bar, select **Mailings**, then **Constant Contact Email**.
2. From the Constant Contact Email screen, click on the **Settings** link at the top of the screen.
3. In the Constant Contact Email Settings screen, select the **Sync Settings** tab. The Sync Settings screen appears.
4. Click the **Sync Campaign Results with DPO Now** button. The sync process will begin immediately. It may take some time to complete, depending on network traffic and the amount of data that needs to be synchronized.

Running the Sync History Report



The Sync History Report lists the details of the nightly sync process. Start and end times are listed, along with the number of Donors inserted and updated in DonorPerfect Online, and the number of Contacts inserted and updated on the Constant Contact website.

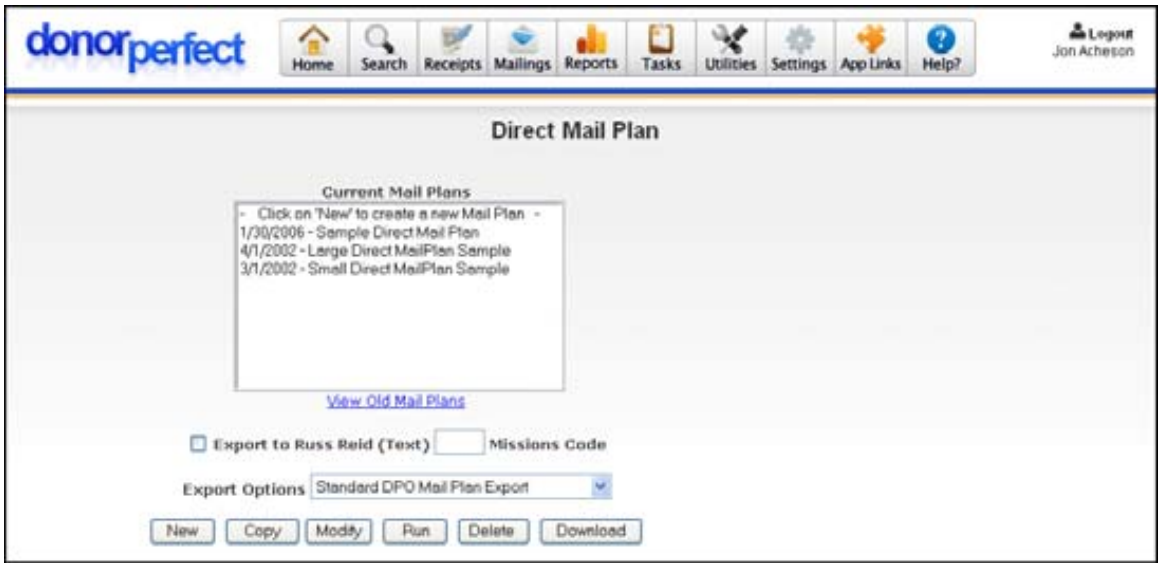
▶ To run the Sync History Report

1. From the navigation bar, select **Mailings**, then **Constant Contact Email**.
2. From the Constant Contact screen, click on the **Settings** link at the top of the screen.

3. In the Constant Contact Email Settings screen, select the **Sync Settings** tab.
4. In the Sync Settings screen, click the **Sync History Report** link. The report will appear in a new browser window.

Direct Mail Plans

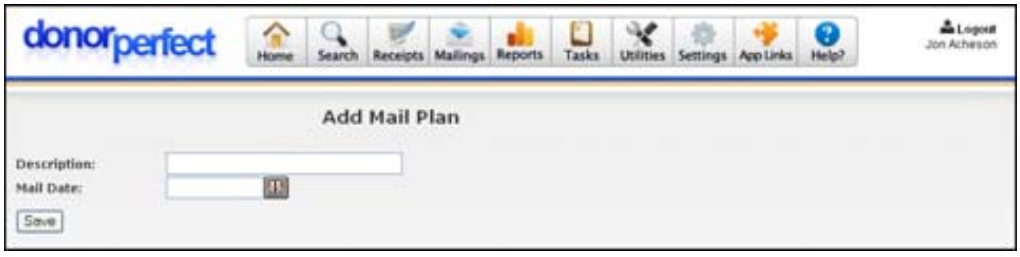
The **Direct Mail Plans** module of DonorPerfect Online allows you to create mail merge files to give to a direct mail house. It allows you to plan and create multiple segmented mail plans. It is especially useful for complicated segmenting and reporting.



Adding a Mail Plan

▶ To add a mail plan

1. Click **Mailings**, and then click **Direct Mail Plans**. The DonorPerfect Mail Plan Creator screen appears.
2. Click the **New** button.



3. Enter the following information:
   - **Description**: the description of the mail plan.

> Note: Do not use apostrophes (') or commas (,) in the Description.

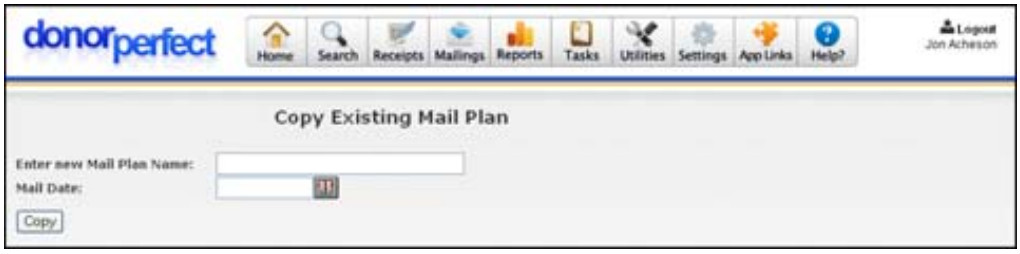
- **Mail Date**: the date the mail is to be sent. You can click the calendar to choose the date.

4. Click **Save**.

Copying an Existing Mail Plan

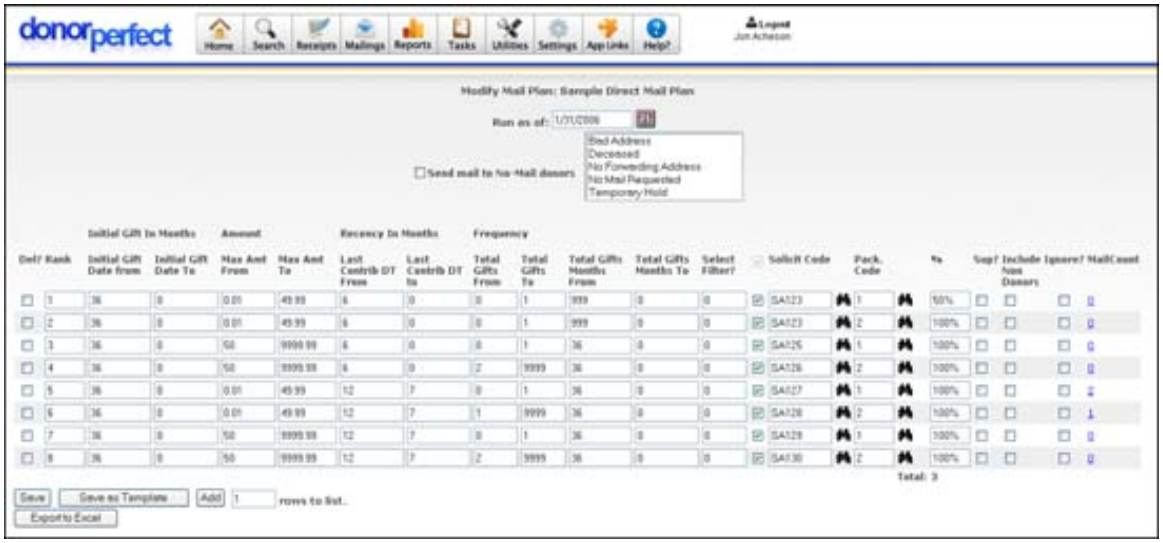
▶ To copy an existing mail plan

1. To copy all details of a mail plan and give it a new name, select the mail plan and click **Copy**.



2. In the **Enter new Mail Plan Name** field, enter the name of the new mail plan.
3. In the **Mail Date** field, enter the mail date. You can click the calendar to choose the date.
4. Click **Copy**.

Modifying the Mail Plan



▶ To modify the mail plan

1. Select the mail plan you would like to change and click **Modify**.
2. By filling in the columns, you will create criteria for each segment. Each set of criteria is composed of the columns you see above, with the option for a filter. For example, in the third set of criteria in the previous graphic, any donor who

has given a maximum gift of between 50 and 999.99 **AND** only gave one gift will be selected.

3. If you need to add more rows for more segments, type in the number of rows to add in **Rows to List** and click **Add**.
4. Click **Save** to save all changes and return to the navigation bar.

Note: You must enter a Rank, Solicit Code and a Package Code.

Running a Mail Plan

▶ To run a mail plan

1. From the navigation bar, select **Mailings**, and click **Direct Mail Plans**.
2. Select the mail plan you wish to use from the **Current Mail Plans** list.
3. If you are planning to send the mail merge data to Russ Reid, check the box marked **Export to Russ Reid (Text)**, and enter your Missions Code in the **Missions Code** field.
4. Select the mailmerge export template you want to use from the **Export Options** list. The following templates are provided by SofterWare:

Standard DPO Mail Plan Export	The standard mailmerge export template for DPO. It contains the following fields: donor_id, title, first_name, middle_name, last_name, title, suffix, salutation, opt_line, address, address2, city, state, zip, country, gifts, gift_total, last_contrib_amt, last_contrib_date, ytd, cytd, org_rec, solicit_code & package_code. This template is not editable by users.
Default Mailmerge (mailmerge) (shared)	This template contains all of the fields from the Main and Bio data entry screens.

See "Export Templates" on page 361 for details on creating additional mailmerge export templates.

5. Click the **Run** button.

The program will use the selected mail plan and segment the database according to the plan, assigning the corresponding Solicitation Code and Package Code to each donor. Once a donor has been assigned a solicitation code, that donor cannot be assigned to a different solicitation code. It is, therefore, important to plan ahead when segmenting your data.

Downloading the Mail Plan File

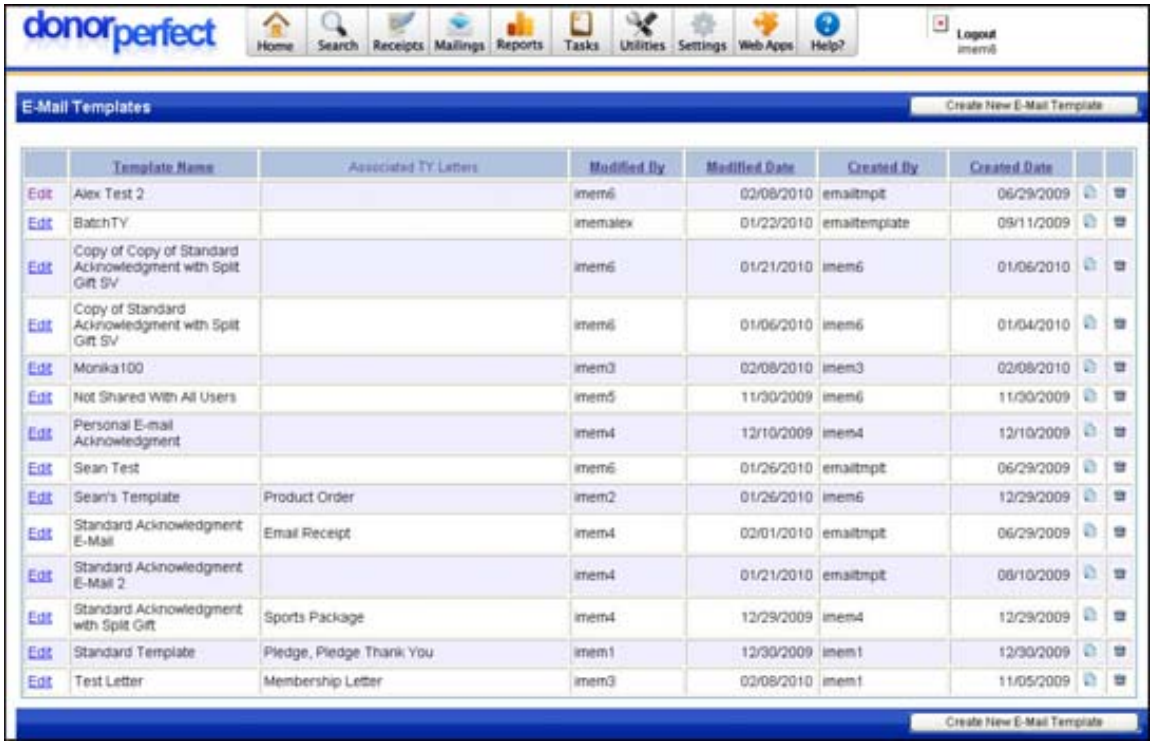
Once the mail plan has been run, you can download the mail plan data to your computer.

▶ To download the file

1. Select the mail plan you want to download and click **Download**. When finished, the program will create a comma-delimited file that can be read into Excel for viewing before sending to your mail house.

Note: For very large files (30,000 records and above), this process may take several minutes. Please be patient- *it will complete.*

Email Templates



	Template Name	Associated TY Letters	Modified By	Modified Date	Created By	Created Date		
Edit	Alex Test 2		imem6	02/08/2010	emailtmplt	06/29/2009		
Edit	BatchTY		imemalex	01/22/2010	emailtemplate	09/11/2009		
Edit	Copy of Copy of Standard Acknowledgment with Split Gift SV		imem6	01/21/2010	imem6	01/06/2010		
Edit	Copy of Standard Acknowledgment with Split Gift SV		imem6	01/06/2010	imem6	01/04/2010		
Edit	Monika100		imem3	02/08/2010	imem3	02/08/2010		
Edit	Not Shared With All Users		imem5	11/30/2009	imem6	11/30/2009		
Edit	Personal E-mail Acknowledgment		imem4	12/10/2009	imem4	12/10/2009		
Edit	Sean Test		imem6	01/26/2010	emailtmplt	06/29/2009		
Edit	Sean's Template	Product Order	imem2	01/26/2010	imem6	12/29/2009		
Edit	Standard Acknowledgment E-Mail	Email Receipt	imem4	02/01/2010	emailtmplt	06/29/2009		
Edit	Standard Acknowledgment E-Mail 2		imem4	01/21/2010	emailtmplt	08/10/2009		
Edit	Standard Acknowledgment with Split Gift	Sports Package	imem4	12/29/2009	imem4	12/29/2009		
Edit	Standard Template	Pledge, Pledge Thank You	imem1	12/30/2009	imem1	12/30/2009		
Edit	Test Letter	Membership Letter	imem3	02/08/2010	imem1	11/05/2009		

Create New E-Mail Template

Email templates allow you to store all of the standard text and settings for your commonly-used email messages. When sending email, you can select a template, and the text and information entered into the template will automatically be entered into your new email message. This saves lots of time, and helps to ensure that the emails contain all the necessary information.

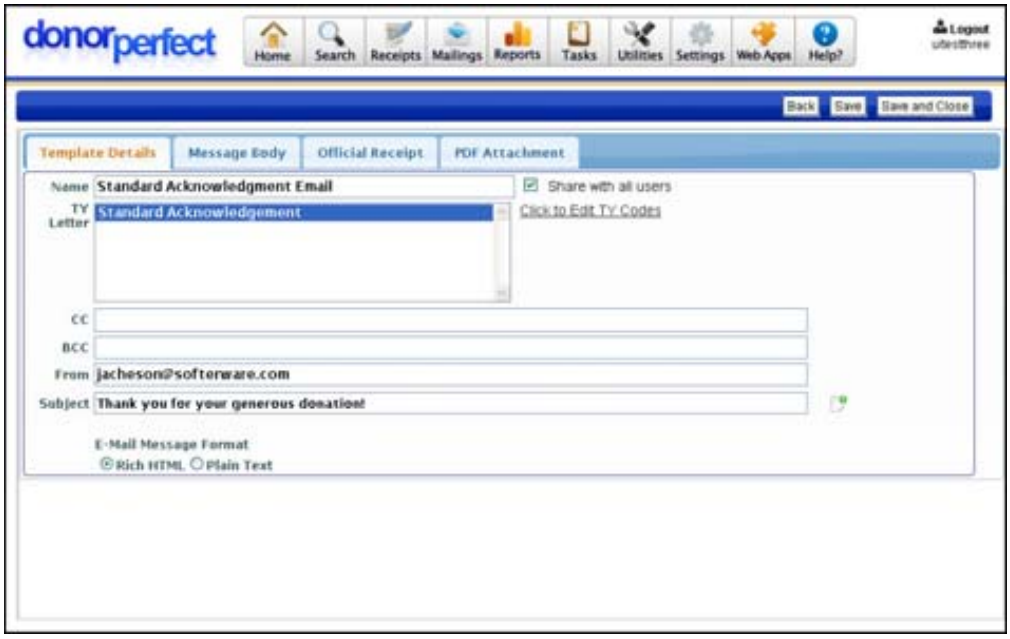
Email templates are created and maintained in the Email Templates screen, which is found in the **Mailings** menu of the navigation bar.

Creating a New Email Template

You can either create a new template from scratch, or make a copy of an existing template (see Copying an Email Template, page 152).

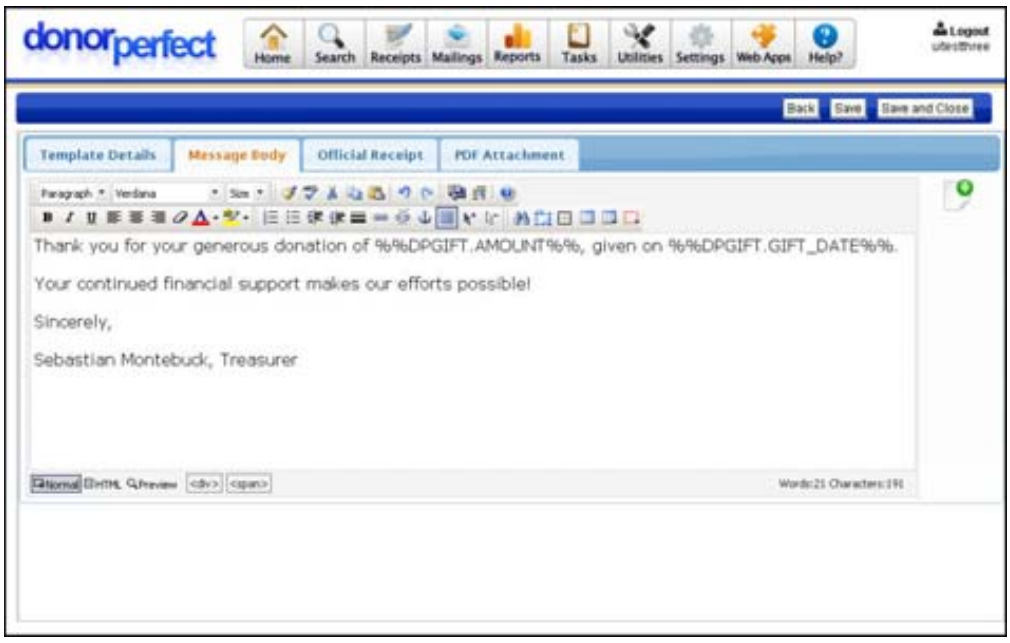
▶ To create a new email template from scratch

1. From the navigation bar, select **Mailings** then select **Email Templates**.
2. At the top of the Email Templates screen, click on the **Create New Email Template** button. A new screen appears:



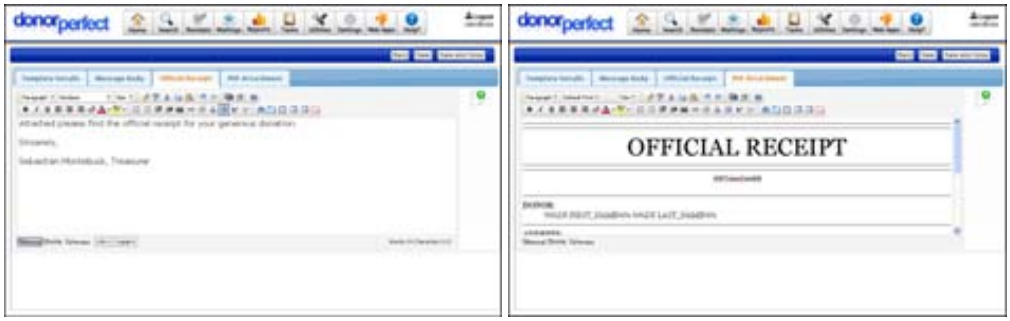
3. The **Template Details** section contains fields for the information that will appear in the message headers of the email message:

Name	A short descriptive name for the template, like "Standard Acknowledgement Email."
Share with all users	If this option is checked, other DonorPerfect Online users will be able to see and use this template. If the option is not checked, only you will be able to see and use it.
TY Letter	Enter the Thank You Letter code that this email corresponds to. Each Thank You Letter Code can correspond to one and only one email template. To select the code from the list of available TY Codes, click the Click to Edit TY Codes link (see "Selecting the TY Code for an Email Template," page 149 for details).
CC	Enter email addresses that you want to receive a copy of this email message when it is sent.
BCC	Enter email addresses that you want to receive a blind carbon copy of this email message when it is sent.
From	Enter the email address that you want to appear in the From field of the email.
Subject	Enter the subject line that you want to appear in the email.



4. The **Message Body** section is where you can enter the text that will appear in the body of the email message. At the bottom of the screen, you can select whether to format the body of the message as **Rich HTML**, which allows you to format the text in a variety of ways using the toolbar at the top of the text field, or as **Plain Text**, which has no formatting.

5. If desired, you can also embed DonorPerfect Online fields in your email message. Embedded fields have an appearance like **%%BIO.AVAILABILITY_DAY%%**. When the email is sent, the embedded field will be replaced with the contents of that field in the current record. See "Embedding Fields in Email Templates" on page 149 for details.



6. The **Official Receipt** and **PDF Attachment** sections are used for email receipting. When email receipting is activated, two emails will be sent to each donor: the standard email, and a second email consisting of the following:

   - The headings will be the same as for the first message, except that "Official Receipt" will be appended to the **Subject** line.
   - The text in the **Official Receipt** tab of the Email Template will form the body of the message.

- The text in the **PDF Attachment** tab of the Email Template will be turned into a PDF and attached to the second email message.

7. To exit the screen, do one of the following:

   - To exit the screen without saving the new template, click the **View Templates** button at the top of the screen.
   - To save the current template without exiting the editing screen, click the **Save** button at the top of the screen.
   - To save the current template and return to the Email Templates screen, click the **Save and Close** button at the top of the screen.

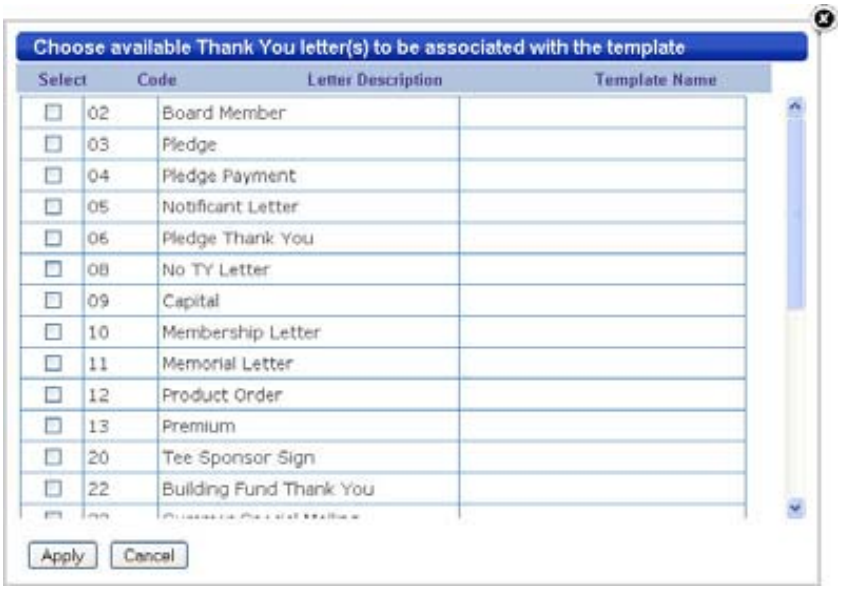
Selecting the TY Code for an Email Template

Each Thank You Letter code (TY code) in the system can be linked to one and only one email template. This aids in processing email thank you letters, as the corresponding email template can be automatically selected based on the TY Code entered for a gift.

The **Click to Edit TY Codes** link next to the TY Letter field in the Email Template editing screen allows you to select the TY Code that will be linked to the current email template.

▶ To select the TY Code for an email template

1. In the Email Template editing screen, click the **Click to Edit TY Codes** link next to the TY Letter field. The **Choose available Thank You letter(s) to be associated with the template** screen appears.



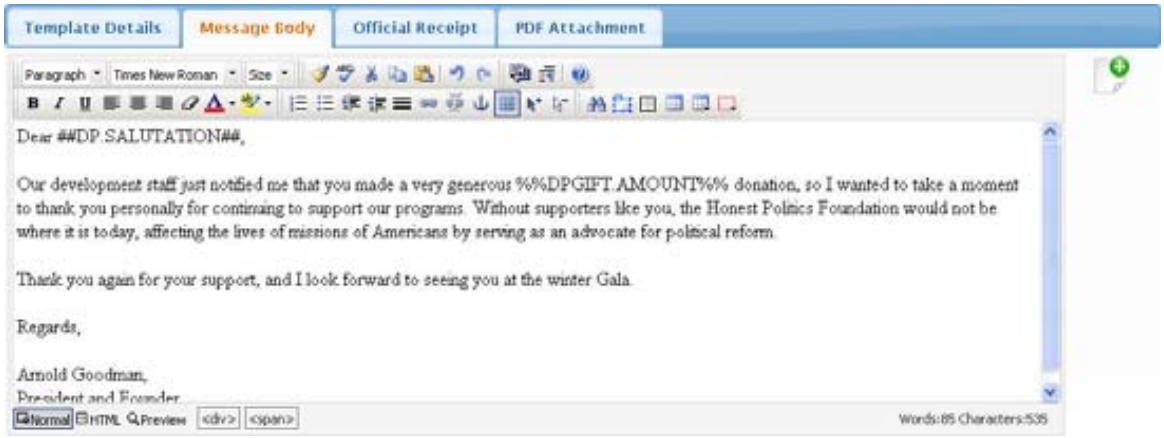
2. Check the box next to the TY Code you want to associate with this template.
3. Click the **Apply** button. The screen closes, and you are returned to the Email Template editing screen. The selected code will be listed in the **TY Letter** field.

Embedding Fields in Email Templates

You can pull data out of your DonorPerfect Online records and include it in your email messages by embedding one or more fields in the message. When the email is sent, the embedded field will be replaced with the contents of that field in the current record.

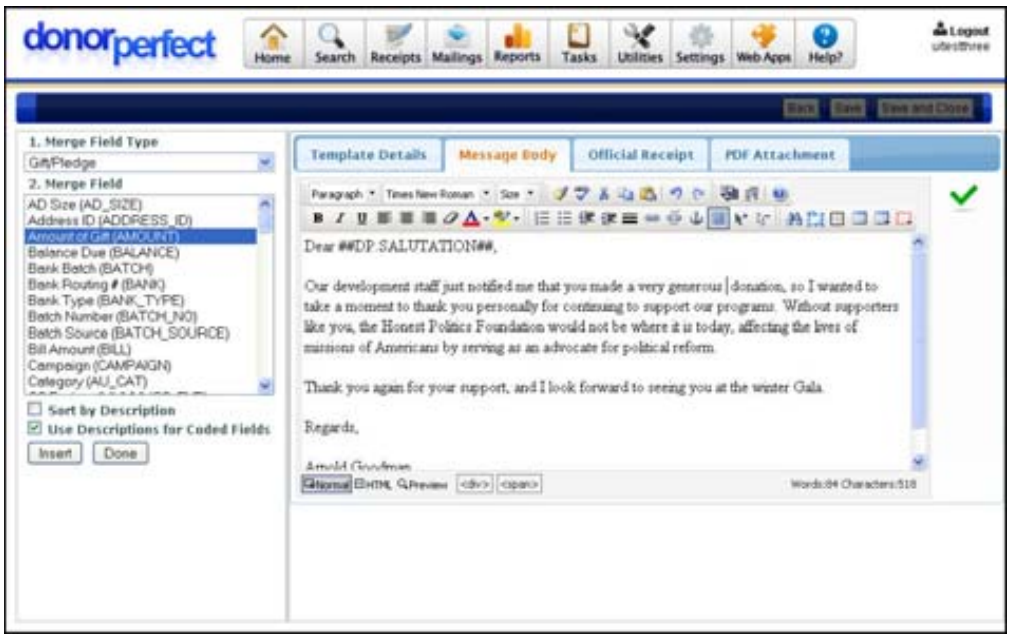
Embedded fields have an appearance like **%%BIO.AVAILABILITY_DAY%%**.

The following example shows the body of an email template. The **DP.SALUTATION** field has been embedded into the text so that the name of the email recipient will appear in the first line of the text. The gift amount will also appear automatically in the body of the message, where the **DPGIFT.AMOUNT** field has been embedded.



▶ To embed a field in an Email template

1. Click the **Insert Merge Field** button that appears to the right of the editable fields. The controls at the top of the screen will be grayed out, and a new set of fields will appear on the left side of the screen:



2. Place your cursor where you want the embedded field to appear in your email.

3. Set **Merge Field Type** to one of the following:
   - **All** – You can enter fields from either the Main/Bio tables, or the Gift/Pledge tables. This is the default setting.
   - **Main/Bio** – You can enter fields from the Main/Bio table only. These are typically fields from the main entry screen or the Bio screen.
   - **Gift/Pledge** – You can enter fields from the Gift/Pledge tables only. These are fields from gift or pledge records.
   - **Functions** – These selections enter a combination of fields and text to provide a fast and easy way to create common message elements such as an address block, or a salutation.
4. If you selected **All**, **Main/Bio**, or **Gift/Pledge** from the **Merge Field Type** list, carry out the following steps to embed your field:
   a. Select the field you want to enter from the **Merge Field** list. Click the **Sort By Description** option to sort the fields in the list by their descriptive text, instead of by their field name.
   b. Check **Use Descriptions for Coded Fields** to display the descriptions for the codes in a coded field, instead of the actual codes contained in the fields. For instance, if you are embedding the solicitation code, the name of the solicitation would be displayed instead of the code.
   c. Click the **Insert** button to insert the selected field into your text.
5. If you selected **Functions** from the **Merge Field Type** list, carry out the following steps to embed your fields and text:
   a. Select one of the following functions:

Function	Description	Example
Address Block	Enters the full set of fields to display the mailing address of the email recipient.	**##DP.TITLE## ##DP.FIRST_NAME##** **##DP.LAST_NAME##** **##DP.ADDRESS##** **##DP.ADDRESS2##** **##DP.ADDRESS3##** **##DP.ADDRESS4##** **##DP.CITY## ##DP.STATE## ##DP.ZIP##**
Salutation	Enters the Dear [recipient] line for the beginning of a message.	**Dear ##DP.SALUTATION##,**
Split Gift Details	Enters a table containing the split gift fields for the current gift record.	**^^** **Prompt1 | Prompt2 | Prompt3 | Prompt4 | Prompt5** **Split_Gift1_F1 | Split_Gift1_F2 | Split_Gift1_F3 | Split_Gift1_F4 | Split_Gift1_F5** **Split_Gift2_F1 | Split_Gift2_F2 | Split_Gift2_F3 | Split_Gift2_F4 | Split_Gift2_F5** **^^**
Today's Date	Enters today's date.	**@@TodaysDate@@**
Tribute	Enters the	**##DPGIFT.TRIBUTE_DESCRIPTION##**

Details	description and main contact fields for the current tribute record.	##DPGIFT.TRIBUTE_MAIN_CONTACT##

b. Click the **Insert** button to insert the fields and text from the selected function into your text.

6. To insert additional fields, repeat steps 2-5.
7. To finish inserting fields and return to the email template, click the **Done** button.

Editing an Email Template

▶ To edit an email template

1. From the navigation bar, select **Mailings** then select **Email Templates**.
2. Click the **Edit** link next to the email template that you want to edit. The template will open in the Email Editing screen. Editing a template works identically to creating a template (see "Creating an Email Template").

Copying an Email Template

▶ To make a copy of an existing Email template

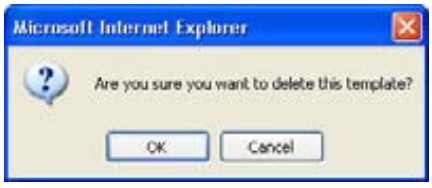
1. From the navigation bar, select **Mailings** then select **Email Templates**.
2. Click the button next to the email template that you want to copy. A confirmation screen will appear:

3. Click the **OK** button to copy the template. The copy of the template will be created, and will be named **Copy of [original name]**.
4. To rename the copy, edit it (see "Editing an Email Template," page 152").

Deleting an Email Template

▶ To delete an Email template

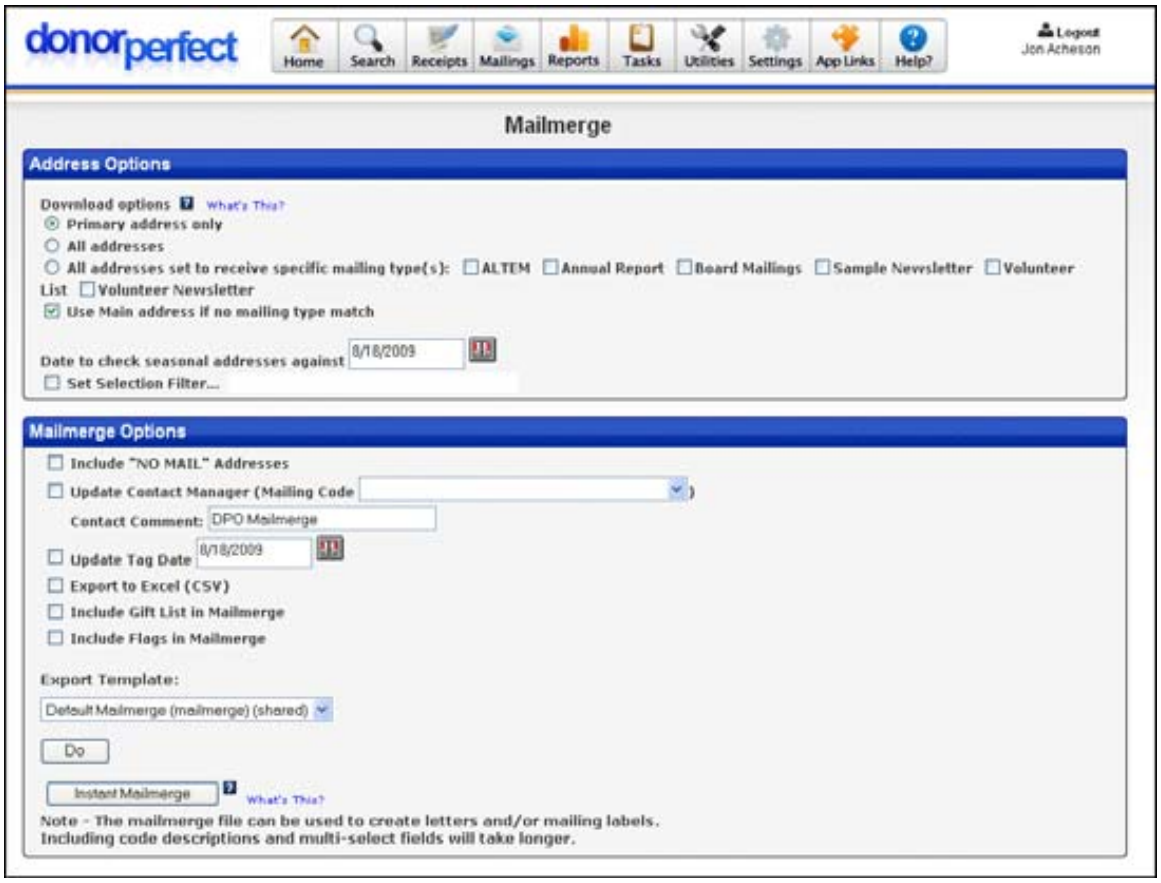
1. From the navigation bar, select **Mailings** then select **Email Templates**.
2. Click the button next to the email template that you want to delete. A confirmation screen will appear:



3. Click the **OK** button to delete the template.

Mail Merge

The Mailmerge screen contains options that allow you to make selections for mail merges—you can determine the donor records to be selected, the database fields to be updated, the output sort order and the label formats. You can also choose to include code descriptions, multi-select fields, and a gift list in the output file. Remember that the more data you include in the output, the longer the file will take to be created.



You'll use mail merges to produce communications for your donors, including personalized acknowledgement letters, solicitations, pledge statements, labels, and envelopes.

▶ To run a mailmerge

1. From the navigation bar, select **Mailings**, and then click **Mailmerge**. The Mailmerge screen appears.
2. Choose the addresses you want to include in the mail merge file:
   - **Primary address**: if the **Account for Seasonal Address in Merge File** parameter in your system is set to "Yes", then secondary addresses with a seasonal date range that includes the specified date will be used instead of the Main address. If there are multiple seasonal address matches, they will all be included. If there are no matching seasonal addresses, then the Main address

will be used. If the Seasonal Address parameter is set to "No", then only the Main address will be used.

- **All addresses**: if the **Account for Seasonal Address in Merge File** in your system is set to "Yes", then secondary addresses with a seasonal date range that includes the specified date will be used IN ADDITION to the Main address. If there are multiple seasonal address matches, they will all be included. If there are no matching seasonal addresses, then the Main address will be used. If the Seasonal Parameter is set to "No", then the Main Address and all other secondary addresses will be used.
- **All addresses set to receive specific mailing types**: if the **Account for Seasonal Address in Merge File** in your system is set to "Yes", then secondary addresses with a seasonal date range that includes the specified date AND the selected mailing types will be used instead of the primary address. If there are multiple secondary address matches, they will all be included. If there are no matches, then the Main address will be used. If the Seasonal Parameter is set to "No", then secondary addresses marked with the selected mailing types will be used. If there are no matches, then the Main address will be used.

3. To make sure that a donor address is always included in the mail merge file, regardless of whether there is an address that matches the selected mailing types, click the **Use Main address if no mailing type matches** check box.
4. Optional: **Set Selection Filter.** If you do not want to print all names in the database, check **Set Selection Filter.** See "Using Selection Filters" on page 159 for details.
5. If you click the **Include "NO MAIL" Addresses** check box, all addresses will receive mail, even the ones marked **Do Not Send Mail**.
6. If you want to update contact information for the records included in the mail merge file, click the **Update Contact Manager** check box, and then choose the appropriate **Mailing Code**. Enter a short description for the contact type in the **Contact Comment** field.
7. To use Tag Dates, click the **Update Tag Date** check box. Tag dates are primarily used for two-pass criteria selections. If checked, all records that were included in the procedure will have their "Tag Date" (field name **tagged**) revised to reflect the date entered in the field.

Note: See "Running Two Pass Selections" on page 176 for detailed procedural information on running two-pass selections.

8. If you want the mail merge file to be exported in a comma-separated-value format that can be opened in Microsoft Excel, click the **Export to Excel (CSV)** check box. If this option is not checked, the export file will be a comma-delimited text file (.**txt**).

9. To include a listing of all constituent donations into one field in the export file, click the **Include Gift List in Mailmerge** check box.
10. If **Include Flags in Mailmerge** is checked, a field will be added to the export file that contains a comma-separated list of all the flags for each donor.
11. If you've created an export template you want to use for the mail merge file, choose it from the **Export Template** pull-down. This template defines which fields will be included in the file you export. For more information on export templates, see page 361.
12. To create the mail merge data file, click **Do.** A **File Download** Window will appear with the following options: **Open this File** or **Save this file.**
13. Choose **Save this file to disk.** The **Save As** Window will open up.
14. In **Save As**, you can select which drive and directory to save your file. The **File Name** will have **donmrg.txt** (or **donmrg.csv**) as its default; you can change this if you wish. Leave **Save As Type** as it is.

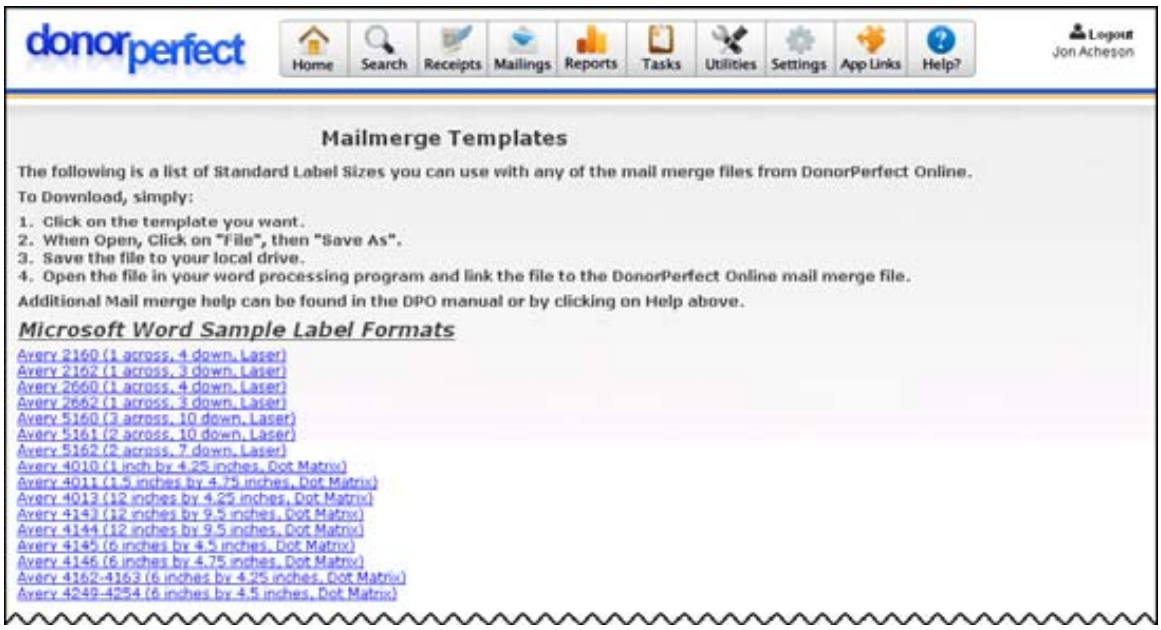
Note: In addition to the normal mail merge file, you may now also include gift information such as the gift date and gift amount. To include this data, check the Include gift list in Mailmerge check box.

DPO offers the ability to automate mail merges from DPO to Microsoft Word. For information regarding the Instant Mailmerge, see "Instant Merge" on page 451.

Mail Merge Templates

The Mailmerge Templates screen allows you to download mail merge document templates that match various Avery mailing labels or common letter types. Once downloaded, you can then use the templates with your word processing program.

DonorPerfect Online allows you to download templates for Microsoft Word and Corel WordPerfect. The process of running mail merges for the templates you download differs between each product. See the Microsoft Word or Corel WordPerfect sections for more details on the templates available and the process for running mail merges.



To access the Mailmerge Templates screen, from the navigation bar, select **Mailings**, then select **Mailmerge Templates**.

Microsoft Word

There are several label formats and letter templates available for download. After you download the templates, you can run the mail merge in Microsoft Word.

Available Label Formats for Download

The following label formats are available for download:

Avery 2160	Avery 4144
Avery 2162	Avery 4145
Avery 2660	Avery 4146
Avery 2662	Avery 4162-4163
Avery 4010	Avery 4249-4254
Avery 4011	Avery 5160
Avery 4013	Avery 5161
Avery 4143	Avery 5162

Available Letter Templates for Download

The following letter templates are available for download:

End of Year Tax Merge Letter (Single Gift List Field)	Thank You Letter
End of Year Tax merge Letter (Multiple Gift List Fields)	Envelope Mailmerge Template
General Mailmerge Letter	Product Order Invoice Letter

Running the Mail Merge

After you've downloaded the template you want to use, you should run the mail merge in Microsoft Word.

▶ To run the mail merge

1. Open the template you downloaded in Word.
2. From the **Tools** menu, click **Mail Merge**. The Mail Merge Helper dialog box appears.
3. In **Section 2**, click the **Get Data** button.
4. From the pull-down that appears, click **Open Data Source**. The Open Data Source dialog box appears.
5. From the **Look in** pull-down, change the directory to find the folder where your mailmerge directory is located.
6. From the **Files of type** pull-down, select **Text Files**.
7. Click **Tools** on the menu bar.
8. Select **Mailmerge**.
9. On the **Mailmerge Helper** dialog box, under **step 2**, click **Get Data** and then click on **Open Data Source**.
10. In the **Files of Type** pull-down box, select **Text Files**.
11. Navigate through the files and folders on your computer, and select the DonorPerfect Online Mailmerge file that contains the mailmerge data.
12. On the **Mailmerge Helper** dialog box, click **Merge** under **Step 3**.
13. On the following dialog box, make sure to set the **Merge To** pull-down box to **New Document**.
14. Select **All under Records** to be **Merged.**
15. Select the **Don't Print Blank Lines** option under **When Merging Records**.
16. Click **Merge**.

Corel WordPerfect

There are several label formats and letter templates available for download. After you download the templates, you can run the mail merge in Corel WordPerfect.

Available Label Formats for Download

The following label formats are available for download:

Avery 2160	Avery 4144
Avery 2162	Avery 4145
Avery 2660	Avery4146

Avery 2662	Avery 4162-4163
Avery 4010	Avery 4249-4254
Avery 4011	Avery 5160
Avery 4013	Avery 5161
Avery 4143	Avery 5162

Available Letter Templates for Download

The following letter templates are available for download:

End of Year Tax Merge	Thank You Letter
General Mailmerge	

Running the Mailmerge

After you've downloaded the template you want to use, you should run the mailmerge in Corel WordPerfect.

▶ To run the mailmerge

1. Click **Tools** on the menu bar.
2. Select **Merge**.
3. Click **Perform Merge**.
4. Make sure the **Form Document** pull-down box is set to **Current Document**.
5. Click Data Source, and select File on Disk.
6. In the **File Type** pull-down box, select **Text Files**.
7. Navigate through the files and folders on your computer and select the DonorPerfect Online Mailmerge file that contains the mailmerge data.
8. Make sure the **Output** pull-down box is set to **New Document**.
9. Click **Merge**.
10. Make sure the Convert File Format From pull-down box is set to ANSI (Windows) Delimited Text, and click OK.

6. Using Selection Filters

Selection filters allow you to select a small number of records in your database that have one or more characteristics in common, and then run lists, mailings or reports using only those records.

For example, you could create a filter that selects only the donors who live in a specified city. If you had an event in that city, you could then use that filter to send out notices to only the donors that live there.

Basic Filter Concepts

Simple Filters vs. Complex Filters

There are two types of selection filters:

- **Simple Filters** select records that match one or more set of criteria contained in the filter. Examples of simple filters include:
  - Select all donors who gave more than $20,000 this year.
  - Select all gifts larger than $500.
  - Select all donors who gave a donation this year.
  - Select those donors whose last gift was less than $100.
  - Select all donors with a net worth greater than a million dollars.
- **Compound Filters** are made by combining multiple simple filters (or even other compound filters), and can be used to perform more complex selections such as:
  - Select the donors who are worth more than a million dollars, but leave out the ones whose last gift was less than $100.

Only the records that test positive for the selection criteria will show up in the lists, mailings or reports that are set to use the selection filter. Records that don't meet the selection criteria will not appear so long as the selection filter is in use.

Sharing Filters

Each time a filter is created, there will be the option to share the filter with other DPO users. If the **Share Across All Users** check box is checked, then the filter will be available for all users to see. Users that have security rights access will be able to edit and delete all filters, shared or otherwise. Users that do not have security rights will be able to see shared filters but cannot edit or delete them.

If a filter is not shared, then only the user that created the filter will be able to see that filter. Of course, if a user creates a filter, that user will be able to edit or delete that filter, regardless of their security rights.

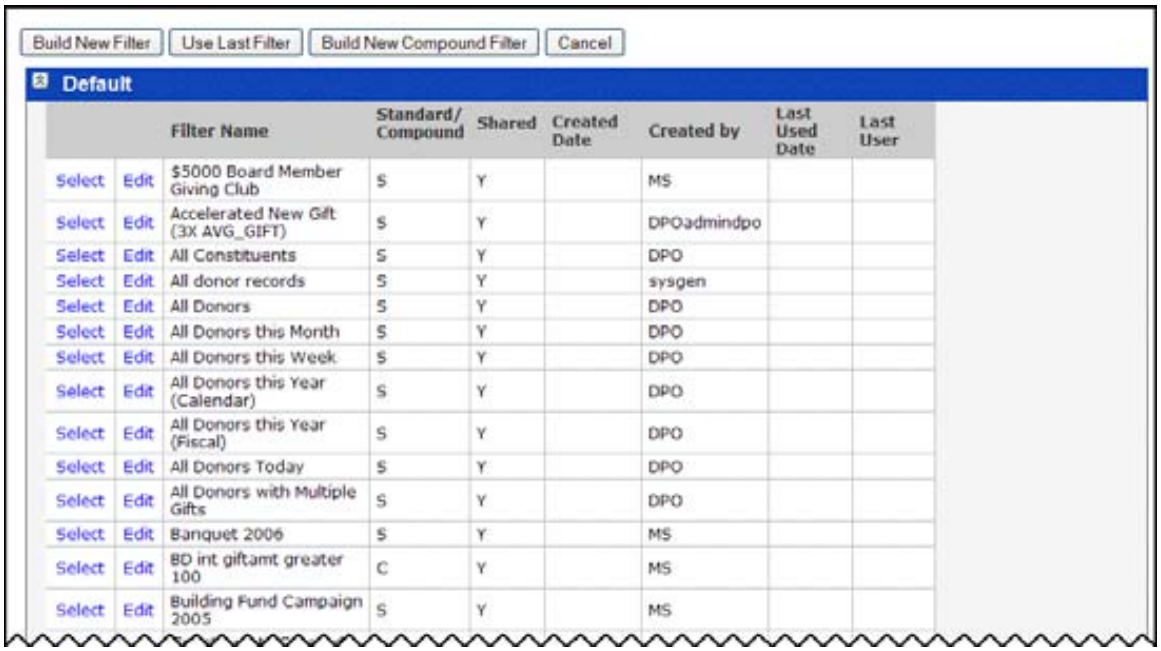
Two Pass Selections

For some types of selections, it is simply not possible to select all of the desired records within a single selection filter. In this case, you can run two different selection filters one after another, using the Update Tag Date function to keep track of the records that were found in the first pass. See "Running Two Pass Selections" page 176 for details.

Setting a Selection Filter in DonorPerfect Online

Every screen that supports the use of selection filters has a Set Selection Filter check box in it.

To set a selection filter for use with the screen, simply check the **Set Selection Filter** box. The Choose a Selection Filter screen appears:



		Filter Name	Standard/ Compound	Shared	Created Date	Created by	Last Used Date	Last User
Select	Edit	$5000 Board Member Giving Club	S	Y		MS		
Select	Edit	Accelerated New Gift (3X AVG_GIFT)	S	Y		DPOadmindpo		
Select	Edit	All Constituents	S	Y		DPO		
Select	Edit	All donor records	S	Y		sysgen		
Select	Edit	All Donors	S	Y		DPO		
Select	Edit	All Donors this Month	S	Y		DPO		
Select	Edit	All Donors this Week	S	Y		DPO		
Select	Edit	All Donors this Year (Calendar)	S	Y		DPO		
Select	Edit	All Donors this Year (Fiscal)	S	Y		DPO		
Select	Edit	All Donors Today	S	Y		DPO		
Select	Edit	All Donors with Multiple Gifts	S	Y		DPO		
Select	Edit	Banquet 2006	S	Y		MS		
Select	Edit	BD int giftamt greater 100	C	Y		MS		
Select	Edit	Building Fund Campaign 2005	S	Y		MS		

You now have the following options:

- Click **Build New Filter** to create a new simple filter. See "Creating a New Simple Filter" page 166 for details.
- Click **Use Last Filter** to reuse the last filter you created/used. See below for details.
- Click **Build New Compound Filter** to create a new compound filter. See "Creating a New Compound Filter" page 171 for details.
- Select an existing filter from one of the folders. See below for details.
- Edit an existing filter. See "Editing Filters" on page 173 for details.

- Click **Cancel** to cancel out of setting a selection filter and return to the previous screen.

Reusing the Last Filter

You have the option to use the last filter you created. This is particularly useful if your last filter was lengthy, and you need to use it again or make slight changes to it.

If you use passwords, then the last filter is set per user. This allows each user to pull up the last filter they created. If you don't use passwords, you will get the last filter used by anyone in the system.

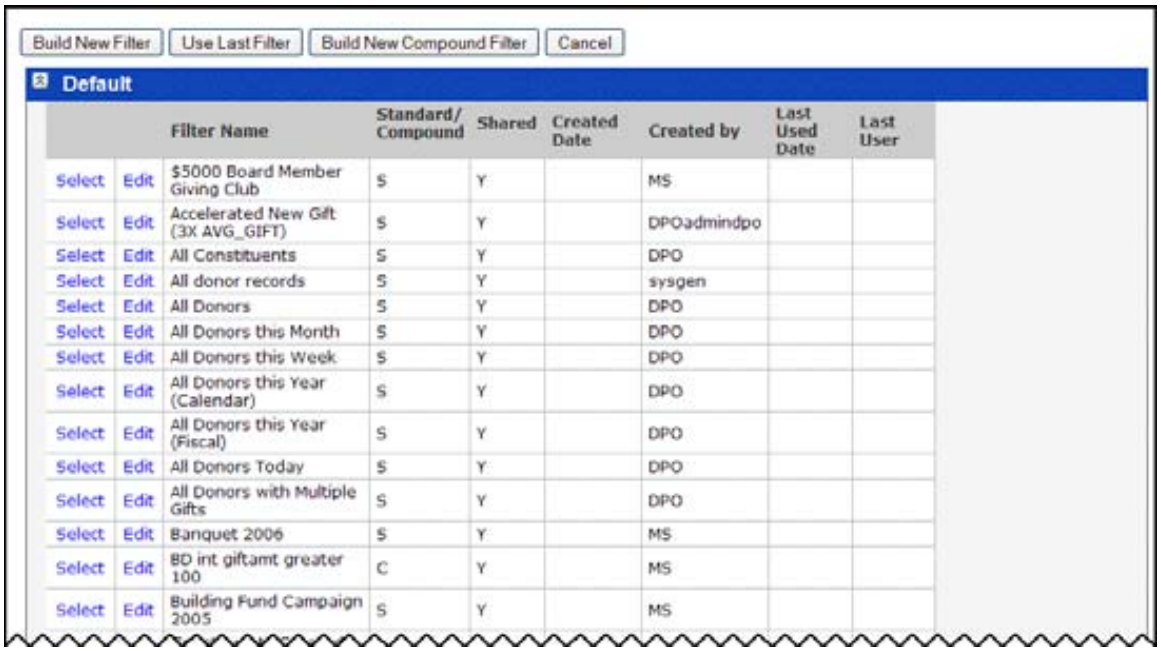
▶ To use the last filter

1. On a screen that supports selection filters, check the **Set Selection Filter** box. The **Choose a selection filter** screen appears.
2. Click the **Use Last Filter** button. The **Verify filter criteria** screen appears, and displays the settings from the last filter usage.

3. Make any necessary changes to the filter settings.
4. Click **Done**. You will be returned to the screen on which you checked **Set Selection Filter**. The selection filter will be enabled, and only records that match the selection criteria will display in the output for that screen.

Selecting a Filter from a Folder

The Choose a Selection Filter screen contains several folders that you can select an existing selection filter from.



		Filter Name	Standard/ Compound	Shared	Created Date	Created by	Last Used Date	Last User
Select	Edit	$5000 Board Member Giving Club	S	Y		MS		
Select	Edit	Accelerated New Gift (3X AVG_GIFT)	S	Y		DPOadmindpo		
Select	Edit	All Constituents	S	Y		DPO		
Select	Edit	All donor records	S	Y		sysgen		
Select	Edit	All Donors	S	Y		DPO		
Select	Edit	All Donors this Month	S	Y		DPO		
Select	Edit	All Donors this Week	S	Y		DPO		
Select	Edit	All Donors this Year (Calendar)	S	Y		DPO		
Select	Edit	All Donors this Year (Fiscal)	S	Y		DPO		
Select	Edit	All Donors Today	S	Y		DPO		
Select	Edit	All Donors with Multiple Gifts	S	Y		DPO		
Select	Edit	Banquet 2006	S	Y		MS		
Select	Edit	BD int giftamt greater 100	C	Y		MS		
Select	Edit	Building Fund Campaign 2005	S	Y		MS		

The **Standard Fundraising Filters** folder contains a number of filters that cover common fundraising uses. See "Standard Fundraising Filters" page 162 for details on what these filters do.

▶ To select an existing filter from a folder

1. Click on the folder heading to expand the folder and view its contents.
2. Click the **Select** link next to the filter that you want to select. You will be returned to the screen on which you checked **Set Selection Filter**. The selected filter will be enabled, and only records that match the selection criteria for that filter will display in the output for that screen.

Note: You can edit the filter folders in the Filters screen under Utilities in the navigation bar. See "Managing Filter Folders" page 173 for details.

Default Fundraising Filters

The following filters are provided with the DonorPerfect Online system. They are intended to cover the most common needs of fundraisers. They can be selected from the **Default Fundraising Filters** folder.

Note: To view the actual selection criteria for the standard filters, you can open them for editing in the Filters screen. See "Editing Filters" page 173 for details.

Filter Name	Description
All Constituents	Selects all constituents in the system. The sole criterion is that the record has a Donor ID.
All Donors	Selects all donors in the system.
All Donors this Month	Selects all donors who have given a gift during the current month.
All Donors this Week	Selects all donors who have given a gift during the current week.
All Donors this Year (Calendar)	Selects all donors who have given a gift during the current calendar year.
All Donors this Year (Fiscal)	Selects all donors who have given a gift during the current fiscal year.
All Donors Today	Selects all donors who have given a gift today.
All Donors with Multiple Gifts	Selects all donors who have given more than one gift.
Constituents Created this Month	Selects all constituents who were entered into the system during the current month.
Constituents Created this Week	Selects all constituents who were entered into the system during the current week.
Constituents Created this Year (Calendar)	Selects all constituents who were entered into the system during the current calendar year.
Constituents Created Today	Selects all constituents who were entered into the system today.
Constituents Modified This Month	Selects all constituents whose records were modified during the current month.
Constituents Modified this Week	Selects all constituents whose records were modified during the current week.
Constituents Modified this Year (Calendar)	Selects all constituents whose records were modified during the current calendar year.
Constituents Modified Today	Selects all constituents whose records were modified today.
Constituents with Contact Activity this Month	Selects all constituents who have some contact activity (a new or updated contact record) during the current month.
Constituents with Contact Activity this Week	Selects all constituents who have some contact activity (a new or updated contact record) during the current week.
Constituents with Contact Activity this Year	Selects all constituents who have some contact activity (a new or updated contact record) during the current year.
Constituents with Contact Activity Today	Selects all constituents who have some contact activity (a new or updated contact record) today.
Constituents with No Donations	Selects the constituents who are not donors.
Constituents with Other Info Activity this Month	Selects all constituents who have had some change to the information on the Other Info screen during the current month.
Constituents with Other Info Activity this Week	Selects all constituents who have had some change to the information on the Other Info screen during the current week.

Filter Name	Description
Constituents with Other Info Activity this Year	Selects all constituents who have had some change to the information on the Other Info screen during the current year.
Constituents with Other Info Activity Today	Selects all constituents who have had some change to the information on the Other Info screen today.
CTYD = 0	Selects constituents with no donations this year-to-date.
Donors LYBNT (Calendar)	Selects the donors who made a donation last calendar year, but not this year.
Donors LYBNT (Fiscal)	Selects the donors who made a donation last fiscal year, but not this year.
Donors Some Year (Calendar)	Selects donors who have made a donation at some time during the last 6 calendar years.
Donors Some Year (Fiscal)	Selects donors who have made a donation at some time during the last 6 fiscal years.
Donors Some Year but Not Last (Calendar)	Selects donors who have made a donation at some time during the last 6 calendar years, but did not donate last year.
Donors Some Year but Not Last (Fiscal)	Selects donors who have made a donation at some time during the last 6 fiscal years, but did not donate last year.
Donors SYBNT (Calendar)	Selects donors who have made a donation some year, but not this calendar year.
Donors SYBNT (Fiscal)	Selects donors who have made a donation some year, but not this fiscal year.
Donors This Year but not Last Year (Calendar)	Selects donors who have made a donation this calendar year, but did not donate the previous year.
Donors This Year but not Last Year (Fiscal)	Selects donors who have made a donation this fiscal year, but did not donate the previous year.
Donors who Downgraded (Calendar)	Selects donors who gave less this calendar year than in the previous year.
Donors who Downgraded (Fiscal)	Selects donors who gave less this fiscal year than in the previous year.
Donors who Stayed the Same (Calendar)	Selects donors who gave the same amount this calendar year as in the previous year.
Donors who Stayed the Same (Fiscal)	Selects donors who gave the same amount this fiscal year as in the previous year.
Donors who Upgraded (Calendar)	Selects donors who gave more this calendar year than in the previous year.
Donors who Upgraded (Fiscal)	Selects donors who gave more this fiscal year than in the previous year.
Donors with Delinquent Pledges	Selects donors who are delinquent on one or more pledges.

Filter Name	Description
Donors with Open-ended Pledges	Selects donors who have made at least one open-ended pledge.
Donors with Pledge Balance > 0	Selects donors whose Total Balance Due is greater than zero.
Donors with Single Gift	Selects donors who have only ever given a single donation.
Donors with Written-off Pledges	Selects donors who have written off (decided not to donate) some part of a pledge.
New Donors this Month	Selects donors whose first gift was given within this month.
New Donors this Week	Selects donors whose first gift was given within this week.
New Donors This Year	Selects donors whose first gift was given within this year.
Re-activated Donors (Calendar)	Selects donors who have given in previous years, and who did not give last calendar year, but gave again this year.
Re-activated Donors (Fiscal)	Selects donors who have given in previous years, and who did not give last fiscal year, but gave again this year.
Retained Donors (Calendar)	Selects donors who gave last calendar year and gave again this year.
Retained Donors (Fiscal)	Selects donors who gave last fiscal year and gave again this year.
YTD = 0	Selects donors who have not made a donation yet this year.
YTD >= $1000	Selects donors who have donated more than a thousand dollars this year.

Disabling the Current Selection Filter

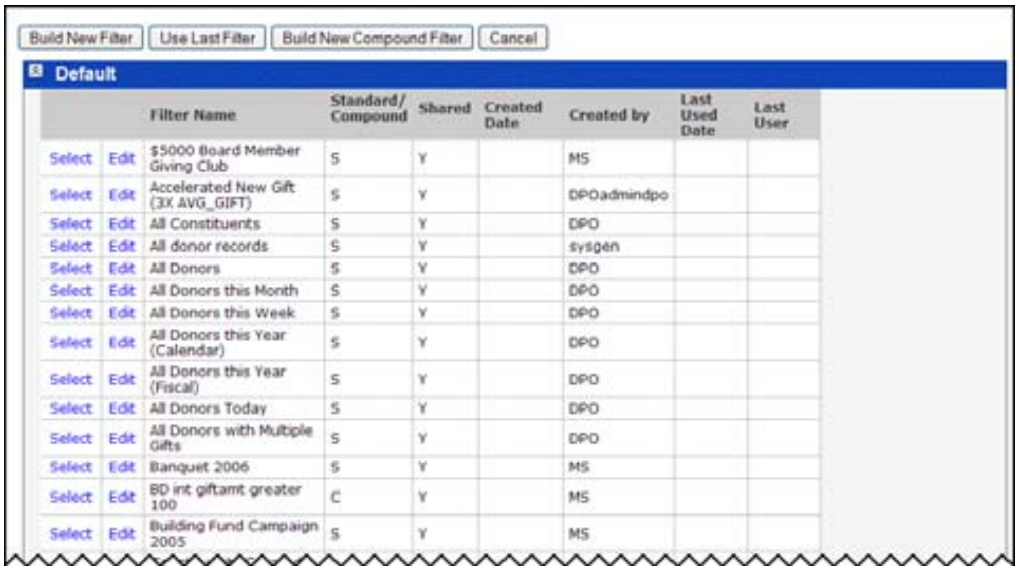
If you want to stop using a selection filter that has been enabled for a screen, simply uncheck the **Set Selection Filter** checkbox. The filter will be disabled, and all records will now display in the output from that screen.

Creating Selection Filters

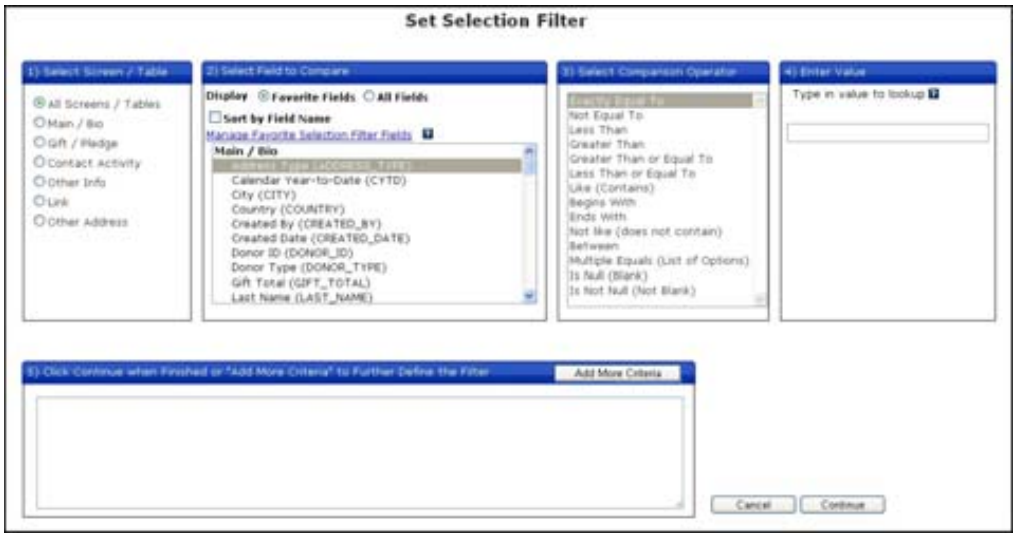
The process to create a new filter is identical whether running lists, mailings, or reports.

▶ To build a selection filter

1. From the screen where you need to define a selection filter, select the **Set Selection Filter** check box. The **Choose a selection filter** screen appears.



2. Click the **Build New Filter** button. The **Enter filter criteria** screen appears.



3. At the top of the screen, in the area marked **1) Select Screen/Table**, select the screen/table that contains the field you want to filter on. See "Selecting the Screen/Table" on page 171 for details.

4. In the **2. Select Field to Compare** section, select the field you want to use in your filter. See "Selecting the Field to Compare" on page 172 for details.

5. In the **3. Select Comparison Operator** section, select the comparison operator you want to use. See "Selecting the Comparison Operator" on page 174 for details.

6. In the **4. Enter Value** section, enter the value that will be compared to the value of the field selected in section 2. See "Entering the Value" on page 176 for details.

7. Click the **Continue** button to finish entering criteria for the selection filter. (See "Adding Additional Criteria" on page 177 for details on entering additional

criteria if desired.) Once you click the **Continue** button, the Filter Criteria (SQL) screen appears.

8. To simply create the selection filter, click the **Done** button. For details on the other functions of the Filter Criteria Screen, see "Using the Filter Criteria (SQL) Screen" on page 178.

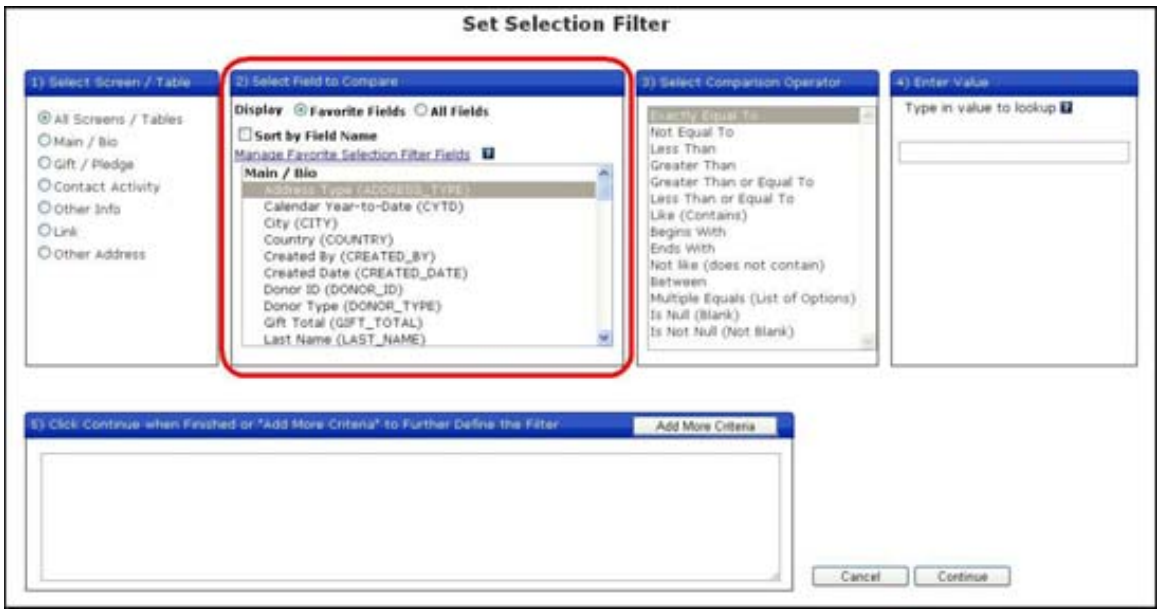
   Once you click on the **Done** button, you will be returned to the screen on which you checked **Set Selection Filter**. The new selection filter will be enabled, and only records that match the selection criteria for that filter will display in the output for that screen.

Selecting the Screen/Table

At the top of the screen, in the **1) Select Screen/Table** area, select the table that contains the field you want to filter on: **Main/Bio**, **Gift/Pledge**, **Contact Activity**, **Other Info**, **Link**, or **Other Addresses**.

If you select **All Screens/Tables**, you will be able to select fields from any table in Step 2.

Selecting the Field to Compare



The **2) Select Field to Compare** area is where you select the field that will be used in the selection filter. The value in this field will be compared to the value specified in the **Enter Value** area to determine whether the record is accepted by the selection filter.

There are two ways to select the field to compare:

- **Favorite Fields** displays a list of the most commonly used fields from the tables selected in Step 1. Because this list is shorter, it is faster to find the fields you want. For details, see "Selecting from the Favorite Fields List," below.
- **All Fields** displays a complete list of all selectable fields in the tables selected in Step 1. See "Selecting from a List of All Fields" on page 174 for details.

Selecting Fields from the Favorite Fields List

The **Favorite Fields** list contains only the most commonly-used fields from the tables selected in Step 1. This approach yields a shorter list of fields that is easier to work with. You can edit which fields appear in the Favorite Fields list.

▶ To select a field from the Favorite Fields list

1. In the **2) Select Fields to Compare** section, set **Display** to **Favorite Fields**.
2. Check the **Sort by Field Name** option to sort the fields by the actual field name (**CYTD** for Calendar Year-to-Date, for instance). If this option is not checked, the fields will be sorted by their descriptive text.
3. Select the field from the list below. The fields are grouped by table and sorted alphabetically within each group.

Setting Up the Favorite Fields List

▶ To select which fields appear in the Favorite Fields list

1. In the Set Selection Filter screen, in the **2) Select Fields to Compare** section, click on the **Manage Favorite Selection Filter Fields** link. The Favorite Selection Filter Fields screen appears:

> **Note:** You can also edit the Favorite Fields settings at the bottom of the User Settings Parameters screen.

2. By default, the screen lists all fields in all screens that are able to be used in a selection filter. To view only the fields for a specific screen or table, select that screen/table from the **Screen/Table** list at the top of the screen.
3. For each screen/table, check the fields that you want to appear in the Favorite Fields list. Fields that are not checked will not appear in the list.
4. Click the **Save** button to save your settings and exit the Favorite Selection Filter Fields screen. You will be returned to the Set Selection Filter screen.

▶ To restore the Favorite Fields settings to the default settings

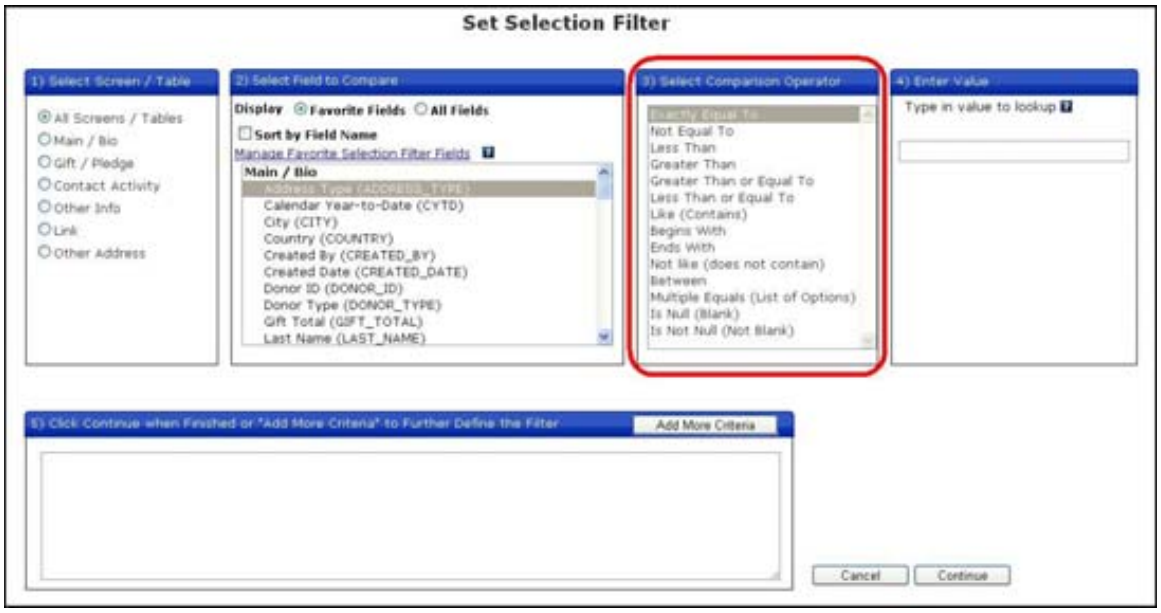
1. In the Set Selection Filter screen, in the **2) Select Fields to Compare** section, click on the **Manage Favorite Selection Filter Fields** link.
2. In the Favorite Selection Filter Fields screen, click the **Restore Favorite Field Defaults** button.

Selecting Fields from a List of All Fields

▶ To select a field from the Favorite Fields list

1. In the **2) Select Fields to Compare** section of the Set Selection Filter screen, set **Display** to **All Fields**.
2. Check the **Sort by Field Name** option to sort the fields by the actual field name (**CYTD** for Calendar Year-to-Date, for instance). If this option is not checked, the fields will be sorted by their descriptive text.
3. Select the field from the list below. The fields are grouped by table and sorted alphabetically within each group.
4. To quickly reach the desired field, place your cursor in the list and type the first letter of the field's description/name. See Appendix E for a list of field names and their descriptions.

Selecting the Comparison Operator

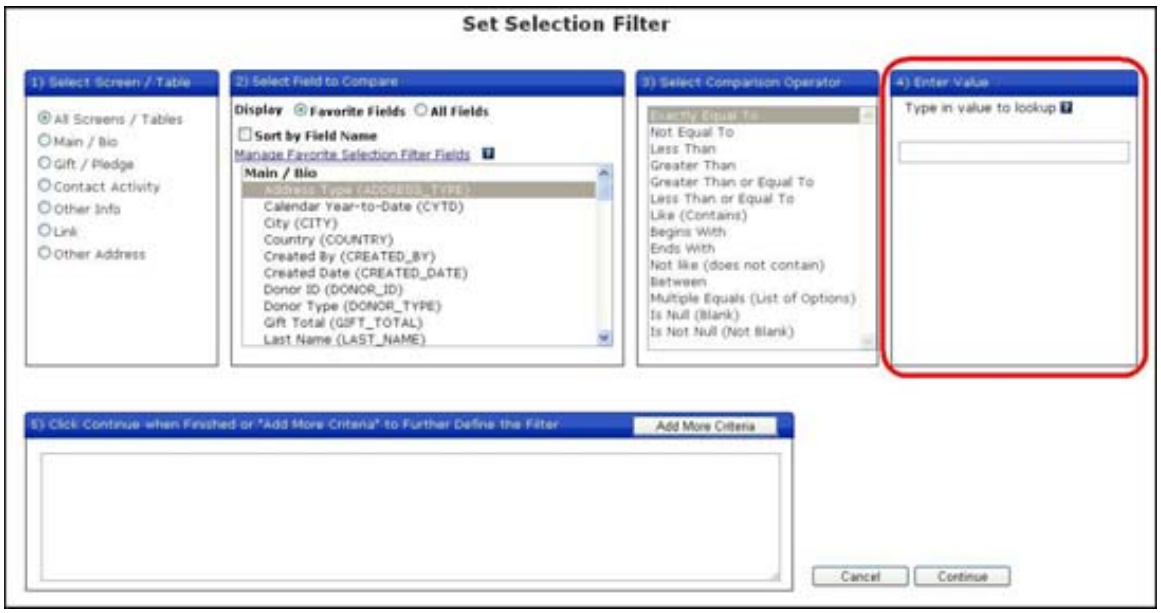


In the **3) Select Comparison Operator** section, select the comparison operator that you want to use to compare the value in the selected field from section 2 with the specified value in section 4. The available comparison operators are:

Operator	Description
= exactly equal to	This operator only finds data that is *exactly* equal to the search string. For instance, last_name = Sand will only return John Sand. It will *not* return Roger Sandstone's record.
<> not equal to	This operator finds data that is not exactly equal to the search string. For instance, last_name <> Sand will return all names that are not *exactly* equal to Sand. (Roger Sandstone *will* be in the result set.)

Operator	Description
> greater than	For numeric fields, this operator finds values greater than but *not* including the values specified. For character fields, it finds records where the character string is alphabetically greater than but *not* including the characters specified.
< less than	For numeric fields, this operator finds values less than but *not* including the values specified. For character fields, it finds records where the character string is alphabetically less than but *not* including the characters specified.
>= greater than or equal	For numeric fields, this operator finds values greater than or equal to the values specified. For character fields, it finds records where the character string is alphabetically greater than or equal to the characters specified.
<= less than or equal	For numeric fields, this operator finds values less than or equal to the values specified. For character fields, it finds records where the character string is alphabetically less than or equal to the characters specified.
like (contains)	This operator finds records where the search string appears anywhere in the field. This is most useful to search for names, etc. when you know part of the name, but not the entire name. For example, last_name like Sand would return Sandstone and Sandman, etc.
begins with	This operator finds records where the selected field starts with the search string. For example, zip begins with 191 would return 19101, 19102, etc.
ends with	Finds records where the selected field ends with the search string. For example, zip ends with 115 would return 19115, 20115, etc.
not like (does not contain)	This operator selects records that do not contain the search string in the field. For example, last_name not like Sand would return everyone *except* donors with a last name that contains the word sand, such as Sandstone, Sandman, etc.
between	When selected, the user enters a range of values for the search. For example, amount between $50 and $100. For example, dpgift.amount between 100 and 1000 returns all donors who have at least one gift with an amount between $100 and $1000.
multiple equals (list of options)	This operator saves the user from a lengthy "OR" statement such as State=CA OR State=AZ OR State=NV. Use this operator to search for all results you are searching for. For example, State is SC, NC, VA, returns all donors with states equal to South Carolina, North Carolina, or Virginia.
is null (blank)	Finds all records where the field is blank. For example, address2 is null would return all records where no second address was entered.
is not null (not blank)	Finds all records where the field has something entered into it.

Entering the Value



In the **4) Enter Value** section, you will enter the value that will be compared against the values in the field from section 2 to determine whether records will be approved by the selection filter.

Values can be entered in the following manners:

- Simply enter a value in the field provided. This value will be compared to the value in the selected field to determine whether a record is selected by the filter or rejected.
- If the field selected in step 2 is a coded field, you can select the value you want from a list of the coded values for that field.

Selecting a Coded Value for a Field

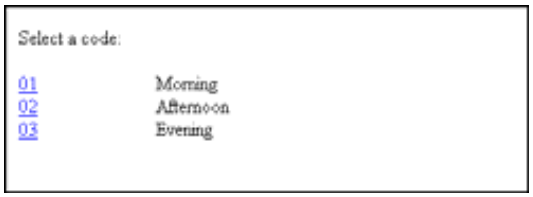
If the field selected in step 2 is a coded field, the **Lookup Active Codes** and **Lookup All Codes** buttons appear:

You can use these buttons to select one of the codes that have been created for the selected field. This is easier than typing the code in from memory, and prevents code entry errors.

- Click **Lookup Active Codes** to select from active codes.
- Click **Lookup All Codes** to select from all codes in the system.

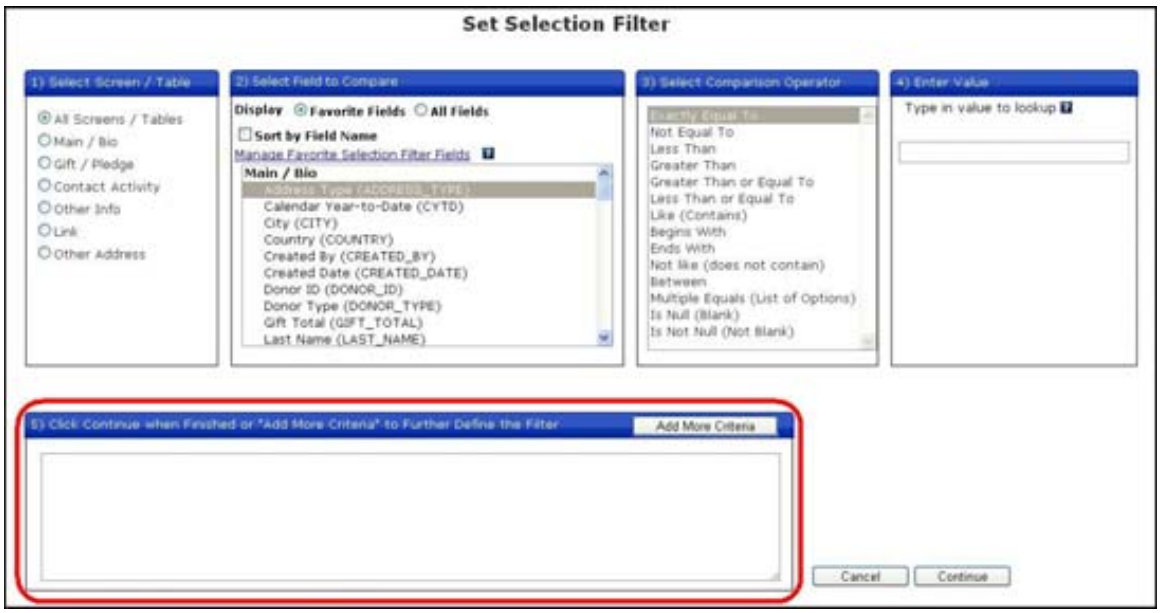
> Note: All codes are active by default unless set to **Inactive** in the Code Maintenance screen. See "Code Maintenance" on page 357 for details.

In either case, a window will appear displaying a list of codes and their meanings.



Click on the link for the desired code and it will appear in the field in Section 4 of the Enter Selection Criteria screen.

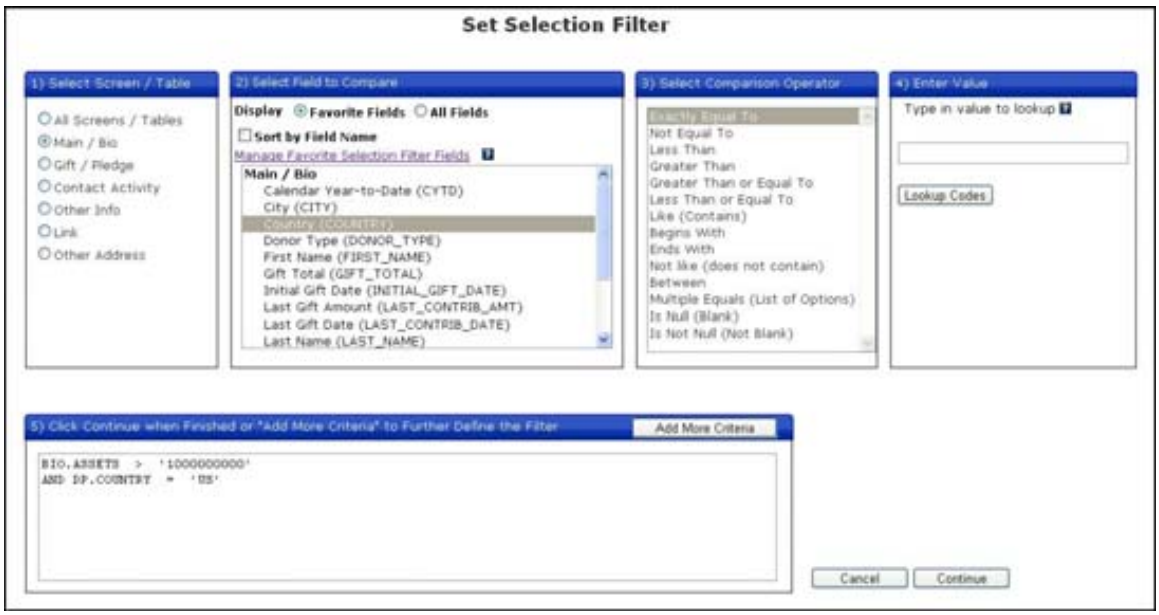
Adding Additional Criteria



Once you have made your selections in areas 1-4, you can either click the **Continue** button to finish setting up the selection criteria for the selection filter, or you can add additional criteria to the selection filter.

For instance, you could specify "Gift records with amounts greater than $100", and then add "And gift date later than January 1, 2011."

To add additional criteria to the filter, click the **Add More Criteria** button at the bottom of the screen and repeat the steps used to create the first criteria. The previously entered criteria will display in the box below the **Add More Criteria** button.



Completing the Selection Criteria

Once you have finished entering selection criteria, click the **Done** button. The Set Selection Filter screen will close, and the Filter Criteria (SQL) screen will appear (see next).

Using the Filter Criteria (SQL) Screen

Once you click the **Done** button in the Set Selection Filter screen, the screen will close and the Filter Criteria (SQL) screen will appear. This screen allows you to do the following:

- Manually edit the SQL statements for the selection filter (for experts only)
- Add additional criteria to the selection filter, if desired
- Select AND or OR to combine multiple criteria
- Save the filter for reuse using the filter name, folder and sharing options

- Cancel the selection filter creation process
- Complete the selection filter creation process and put the filter into effect

Manually Editing the Selection Filter SQL Statements

The selection criteria are displayed in the fields at the top of the screen. The code may be edited by hand if desired. (Experience with SQL statement syntax is strongly recommended.)

You can also delete one of the selection criteria by clicking on the **Delete** link to the right of the field.

Adding Additional Criteria to the Selection Filter

You can click the **Add More Criteria** link to go back to the Set Selection Filter screen and add more criteria to the selection filter. See "Adding Additional Criteria" on page 177 for details.

Select AND or OR to Combine Multiple Criteria

If multiple selection criteria were entered, set **Combine criteria with** to one of the following operators to determine how records will be selected:

- If **AND** is selected, only records that test positive for all selection criteria will be selected.
- If **OR** is selected, records that test positive for any of the selection criteria will be selected.

Saving a Filter using the Setting Filter Name, Folder and Sharing Options

The **Filter Name**, **Filter Folder** and **Share across all Users** options allow you to save a filter for reuse. The **Filter Name** is the name that will appear in the list of filters, the **Filter Folder** is the folder in which the name will appear, and the **Share across all Users** option selects whether the filter will be usable by other users on your system.

▶ To save the filter to reuse later

1. Enter a name for the filter in the **Save filter as** field.
2. Select the **Filter Folder** you want to save the filter to. You can also click **Add New Filter Folder** to create a new filter folder to store the filter in. See "Managing Filter Folders" page 173 for details on filter folders.
3. If desired, check **Share across all Users?** to make the saved filter available to all users on the system.

Cancelling the Selection Filter Creation Process

To quit the filter creation process at any time, click the **Cancel** button. You will be returned to the screen on which you checked **Set Selection filter**, and no filter will be in effect.

Completing the Selection Filter Creation Process

Click **Done** to complete the filter creation process. You will be returned to the screen on which you checked **Set Selection Filter**. The new selection filter will be enabled, and only records that match the selection criteria for that filter will display in the output for that screen.

Creating Compound Filters

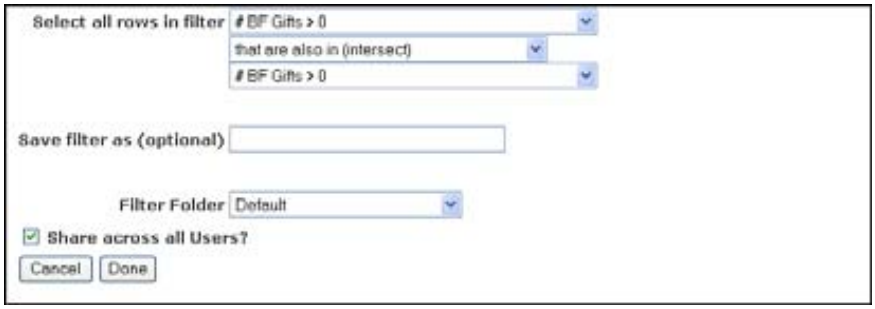
A compound filter is a user-created filter that uses two simple or compound filters as its criteria. An example of a compound filter would be to combine the Filter "Donors over $50.00" with the filter "Donors Income Over $50,000." Any of your saved filters may be used in combination to create a compound filter, including other compound filters.

Note: Before creating a compound filter, you must first create the individual filters that the compound filter will include.

▶ To create a compound filter

1. There are two ways to get started creating a compound filter:
   - From any screen that supports selection filters, check **Set Selection Filter**, then in the Choose a Selection Filter screen, click the **Build New Compound Filter** button.
   - From the **Filters** screen, click the **Create New Compound Filter** button.

   With either method, the Create New Compound Filter screen appears.



2. Select the first filter from the list.
3. Select the appropriate operator from one of the following options:
   - **That are also in (intersect)** – The data selected must contain *both* filter criteria. In the previous example, for a donor to be returned, she must have donated over $50 AND she must earn over $50,000 per year.
   - **Combined with rows in (union)** – The data selected must contain at least one of the filter criteria. For instance, a union of the above criteria would return both those donors that gave over $50 and those donors that earn over $50,000 per year.

- **Minus any rows that are also in (subtract)** – The data selected will be the data that matches the first filter criteria but does not match the second filter criteria. For example, the results would be those donors who gave over $50, minus those donors that earn over $50,000.

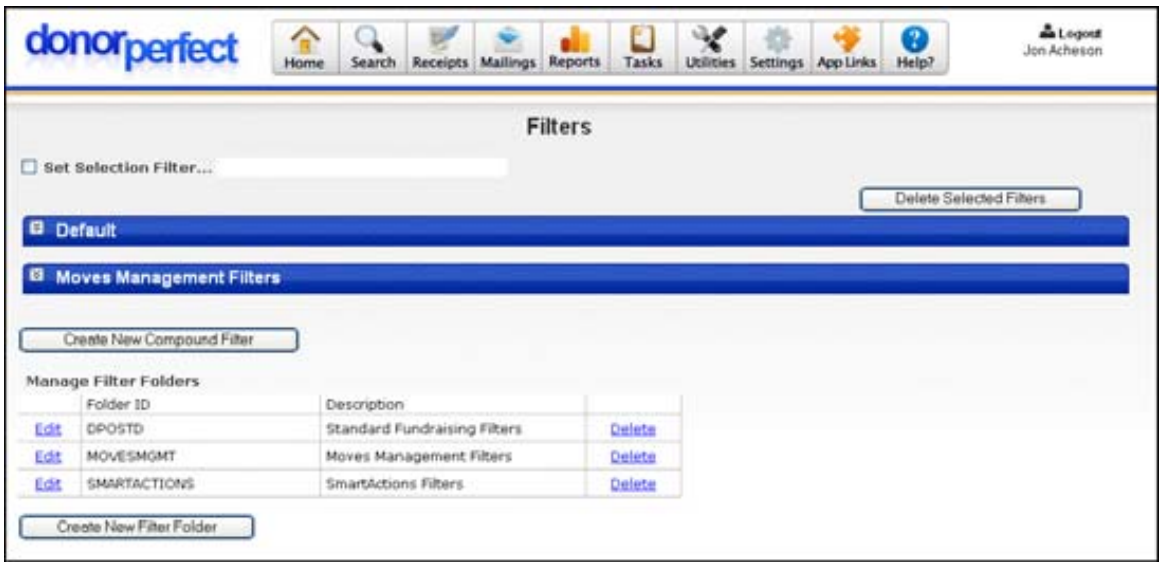
4. Select your second filter from the saved filter list.
5. If you want to save the compound filter to reuse later:
   a. Enter a name for the filter in the **Save filter as** field.
   b. Select the **Filter Folder** you want to save the filter to. See "Managing Filter Folders" page 173 for details on filter folders.
   c. If desired, check **Share across all Users?** to make the saved filter available to all users on the system.
6. To quit the filter creation process at any time, click the **Cancel** button. You will be returned to the screen you started from, and no selection filter will be in effect.
7. Click **Done** to complete the compound filter creation process. You will be returned to the screen you started from. The new compound selection filter will be enabled, and only records that match the selection criteria for that filter will display in the output for that screen.

Managing Filters

The Filters screen allows you to perform the following filter-related tasks:

- Create filters
- Edit filters
- Organize filters into folders
- Track filter use
- Copy filters
- Delete filters

To access the Filters screen, click **Settings** in the navigation bar, and then click **Filters**.



Creating Filters

Selection filters can be created from the Filters screen, as well as from any other screen that supports the use of selection filters. See "Creating Selection Filters" page 166 for details on creating simple and compound selection filters.

Editing Filters

Any of your saved filters may be edited by click the **Edit** link next to it, in either the Filters screen, or the Choose a Selection Filter screen**.** This functionality is for the more advanced user because you have to know the codes and operators themselves.

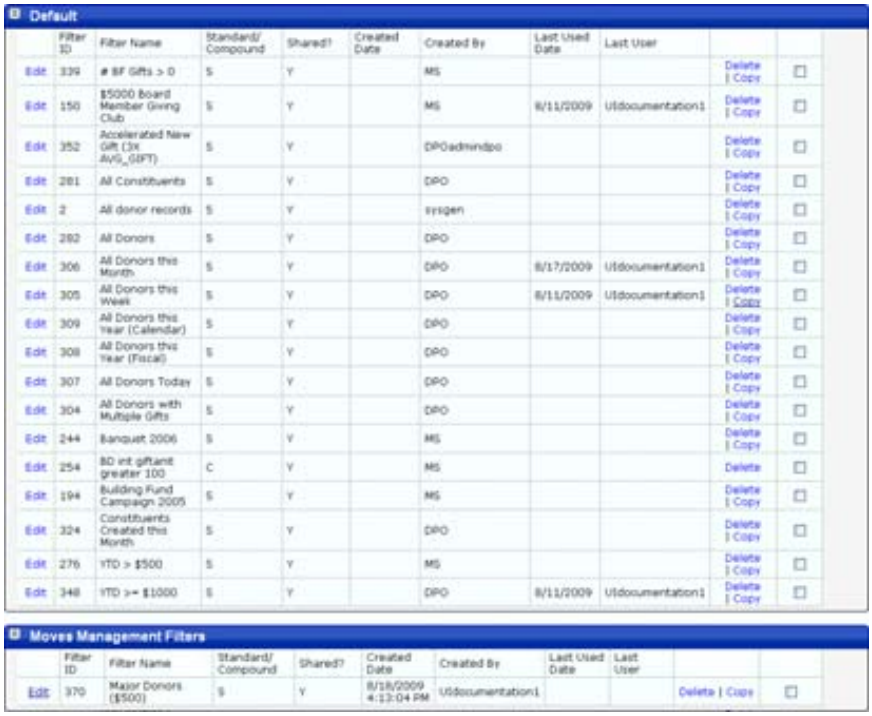
Note: The system does not complete the filter for you automatically.

Managing Filter Folders

You can use folders to organize your selection filters by category. This becomes particularly useful as the number of filters stored in the system increases. Folders appear in both the Filters screen, and in the Choose a Selection Filter screen.

By default, the folders are collapsed, so that only the folder names are displayed. Click on the folder header to expand the folder, and display its contents.

Selection Filter Folders (Collapsed View)



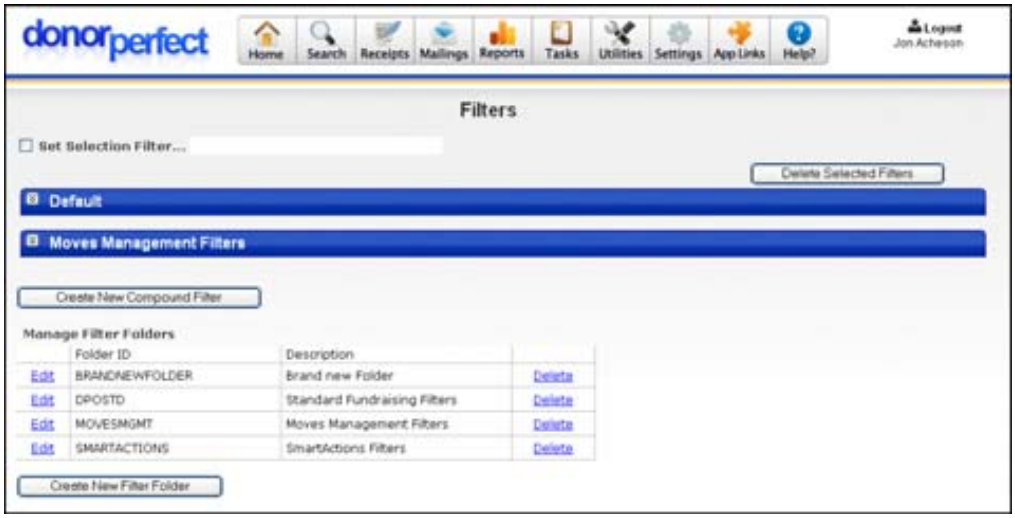
Selection Filter Folders (Expanded View)

Creating Filter Folders

▶ To create a new filter folder

1. In the Filters screen, click on the **Create New Filter Folder** button. The Create Filter Folder screen appears.

2. Enter a text string with no spaces or punctuation into the **Folder ID** field. This is an internal system name for the folder.
3. Enter a brief descriptive name for the folder into the Description field. This is the folder name that will appear in the system. If possible, it should identify what the filters are to be used for. The Description name can include spaces and punctuation. Some sample names could be:
   - **President's Club Filters**
   - **Holiday Mailing Filters**
   - **Chicago Promotion Filters**
4. Click the **Save** button. You are returned to the Filters screen, and the new filter folders now appear in the list under Manage Filter Folders.



> **Note:** While the new folder is created in the system, and appears in the **Manage Filter Folders** list, it will not appear in the top part of the screen or in the Choose a Selection Filter screen unless there is at least one filter in the folder.

Deleting Filter Folders

▶ To delete a folder

1. Click on the **Delete** link next to the folder in the **Manage Filter Folders** list.

2. Click **OK** to delete the folder, or **Cancel** to cancel deletion.

> **Note:** When a folder is deleted, all of the filters it contained are moved to the Default folder.

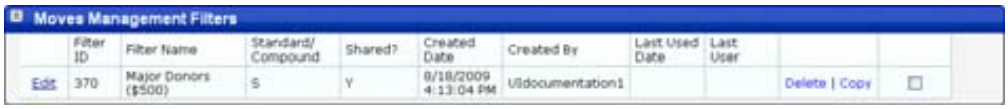
Tracking Filter Use

On the Filters screen, you can view when a filter was last used in the **Last Used Date** column and the last user who ran it in the **Last User** column. You can use this information to decide which filters can be deleted.

Copying Filters

▶ To make a copy of a selection filter

1. In the Filters screen, open the filter folder containing the filter you want to copy.



2. Click on the **Copy** link next to the filter.

3. In the Copy Filter screen, you can edit the name, filter folder, filter settings, and sharing option for the copy of the filter.
4. Click **Copy**. You will be returned to the Filters screen, and the copy of the filter will be created and placed in the selected filter folder.

Deleting Filters

▶ To delete a selection filter

1. In the Filters screen, open the filter folder containing the filter you want to delete.

2. Click on the **Delete** link next to the filter. A confirmation screen appears.

3. Click **OK** to delete the filter, or **Cancel** to cancel the deletion.

Running Two-Pass Selections

In a two pass selection, you run two different filters on the records in the database, one after another. This allows you to make certain types of selections that are not possible in a one stage filter.

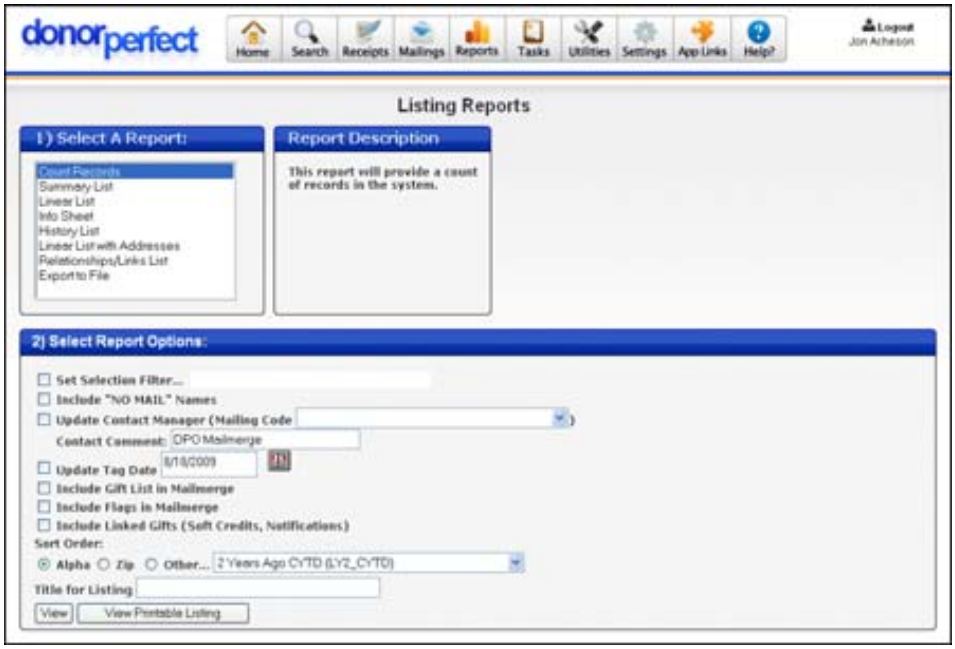
Two pass selections use the Update Tag Date feature in order to function. On the first pass, the Update Tag Date option is used to mark those records that meet the first set of criteria with an updated Tag Date. On the second pass, you can then select records that meet a second set of criteria, along with the ones that have the updated tag date.

For instance, you may want to select all donors who have given two different types of gifts (say one gift with **dpgift.solicit_code = 'BANQ'** and one gift with **dpgift.soli**cit_code= 'MM1').

To run this as a two-pass selection:

▶ To run the first pass

1. From the navigation bar, select **Reports**, then **Listings**.



2. Under **Select a Report**, select **Count Records**.
3. Create the selection filter:
   a. Check **Set Selection Filter**.
   b. Click the **Build New Filter** button.
   c. Set the screen/table to **Gift/Pledge**.
   d. Set the field to **SOLICIT_CODE**.
   e. Set the comparison operator to **= exactly equal** to.
   f. Set the value to **BANQ**.
   g. Click the **Done** button to finish adding criteria.
   h. Click the **Done** button to create the filter.
4. Check **Update Tag Date**.
5. Click the **View** button to run the listing and update the Tag Date on the records that are selected by the filter.

▶ To run the second pass

1. From the navigation bar, select **Reports**, then **Listings**.

2. Under **Select a Report**, select **Count Records**.
3. Clear the previous selection filter.
4. Create a new selection filter:
   a. Check **Set Selection Filter**.
   b. Click the **Build New Filter** button.
   c. Set the screen/table to **Gift/Pledge**.
   d. Set the field to **SOLICIT_CODE**.
   e. Set the comparison operator to **= exactly equal to**.
   f. Set the value to **MM1**.
   g. Click the **Add More Criteria** button.
   h. For the new criteria, set **Screen/Table** to **Main/Bio**.
   i. Set the field to **TAG_DATE**.
   j. Set the comparison operator to **= exactly equal to**.
   k. Click the **Today** button to put today's date into the value field.
   l. Click the **Done** button to finish adding criteria.

   m. Click the **Done** button to create the filter.
5. Clear the **Update Tag Date** check box.
6. Click the **View** button to run the listing

The reason these criteria need two passes is that when selecting from the Gift File, once DonorPerfect finds a gift that matches the criteria, it selects the name. If you tried to use the criteria **solicit_code = 'BANQ'** AND **solicit_code = 'MM1'**, no one would be selected because one gift cannot have both solicitation codes.

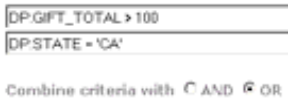
Sample Selection Filters

This section includes many sample selection filters that you can use to become more familiar with the concepts discussed in this chapter. Each sample selection filter included in this section lists the following information:

- An explanation of which records the selection filter will find
- Actual selection filter
- The table, field, operator, and comparison used in the selection filter

Single Selection Statement Examples

Finds records where	Selection Filter	Screen/ Table	Field	Operator	Value
Donor resides in California.	DP.STATE = 'CA'	Main	State	=	CA
Donor's grand total is greater than or equal to $100.	DP.GIFT_TOTAL >= 100	Main	Gift_total	>=	100
Donor's most recent contribution was on or after Feb. 1, 2006.	DP.LAST_CONTRIB_DATE >= '02/01/1998'	Main	Last_contrib_date	>=	02/01/2006
"BD" appears in the Flags field.	DPFLAGS.FLAG IN ('BD')	Main	Flag	Like	BD

Finds records where	Selection Filter	Screen/ Table	Field	Operator	Value	Connector
Donor either lives in California OR gave over $100.		Main Main	State Gift_total	= >	CA 100	OR
Donor's grand total is greater than $100 and they live in California.		Main Main	State Gift_total	= >	CA 100	AND

Filters That Use a Comparison

Using a Character as a Comparison

If a character is used as the comparison, it must exactly match the character on the account record. Example: The comparison **SAN DIEGO** will not find any matches if the information was entered as **San Diego**. Also, character searches do not require the comparison to be completely spelled out to find a match.

The following are examples of a character used as a comparison.

Finds records where	Selection Filter	Screen/ Table	Field	Operator	Value
All cities that begin with an "S"	DP.CITY LIKE 'S%'	Main	City	Begins with	S
All cities that begin with "San"	DP.CITY LIKE 'San%'	Main	City	Begins with	San
All cities that end with an "S"	DP.CITY LIKE '%S'	Main	City	Ends with	S

Using a "Blank" as a Comparison

Using "blank" or nothing as a comparison will find records where the designated field is blank or contains no information.

The following are examples where nothing is entered in the comparison field.

Finds records where	Selection Filter	Screen/ Table	Field	Operator	Value
Zip code field is blank (empty).	DP.ZIP IS NULL	Main	Zip	Is null	N/A
Zip code field has an entry.	DP.ZIP IS NOT NULL	Main	Zip	Is not null	N/A

Using A Number as a Comparison

When using a number, it is not necessary to type in the decimal point. The following are examples where numbers are used as a comparison.

Finds records where	Selection Filter	Screen/ Table	Field	Operator	Value
All donors who gave a single gift between $50 and $100.	DPGIFT.AMOUNT BETWEEN 50 AND 100	Gifts	Amount	Between	50-100
All donors whose Last Year-to-Date amount is greater than $100.	DP.LY_YTD > 100	Main	Ly_ytd	>	100

Using A Field as a Comparison

A field name may be used as a comparison. To do so, the field must be entered in the **Selection Filter Verification Screen**. It does not matter if field names are capitalized or in lower case letters.

The following are examples of using a field as a comparison.

Finds records where	Selection Filter	Screen/ Table	Field	Operator	Value
Donor's LY_YTD total has increased this last year over last two years.	DP.LY_YTD > LY2_YTD	Main	Ly_ytd	>	Ly2_ytd
Donor gave more than one gift last year.	DP.LY_YTD > LS_AMT	Main	Ly_ytd	>	Ls_amt
Donor who gave two years ago and increased last year's gift.		Main	Ly2_ytd	>	0
				AND	
		Main	Ly_ytd	>	Ly2_ytd

Using a Mathematical Equation as an Operator

Occasionally, a mathematical equation is used as an operator. For example, donors who gave 25% more this year than last year.

There are four mathematical equations available as operators. They are: * (multiplication); + (addition); - (subtraction); and / (division). These statements can only be entered in the **Verify filter criteria** screen.

The following are examples of selection statements using mathematical operators.

Finds records where	Selection Filter	Screen/ Table	Field	Operator	Value
Donor increased his/her LY_YTD giving by more than 25% over two years ago LY2_YTD.	DP.LY_YTD > LY2_YTD*.25	Main	Ly_ytd	>	Ly2_ytd*1.25
Donor's total of the past two years giving is more than $1,000.	DP.LY_YTD +DP.LY2_YTD> 1000	Main	Ly_ytd+Ly2_ytd	>	1000

Common Selection Filters

The following table details some common selection statements used in DonorPerfect. As with all selection filters, it does not matter if the field names are capitalized or lowercase, or if there are spaces in the selection filter.

Finds records where	Selection Filter	Screen/ Table	Field	Operator	Value
Donor gave this year.	DP.YTD > 0	Main	Ytd	>	0
Donor gave last year.	DP.LY_YTD > 0	Main	Ly_ytd	>	0

Finds records where	Selection Filter	Screen/ Table	Field	Operator	Value
Donor has given a gift since Jan. 2006.	DP.LAST_CONTRIB_AMT > 01/01/2006	Main	Last_contrib_amt	>	01/01/2006
Donor gave last year but not this year.		Main Main	Ytd Ly_ytd	= AND >	0 0
Donor's last name begins with "S" through "Z."	DP.LAST_NAME >= 'S'	Main	Last_name	>=	S
Donor does not have email.	DP.EMAIL IS NULL	Main	Email	Is null	N/A
Donor's zip code begins with "92."	DP.ZIP LIKE '92%'	Main	Zip	Begins with	92
Donor's email field is not blank.	DP.EMAIL IS NOT NULL	Main	Email	Is not null	N/A
Donor has "VL" in Flags field.	DPFLAGS.FLAG = 'VL'	Main	Flags	=	VL
Donor is not a board member. Flag field does not contain "BD".	dp.donor_id NOT IN (SELECT donor_id FROM dpflags WHERE flag = 'BD')	Main	Flags	<>	BD

Gift History Filters

Find records where	Selection Filter	Screen/ Table	Field	Operator	Value
Gave a gift between these two dates.	DPGIFT.GIFT_DATE BETWEEN '01/01/2006' AND '06/30/2006'	Gifts	Gift_Date	Between	01/01/2006 – 06/30/2006
Gave a gift to this solicitation code.	DPGIFT.SOLICIT_CODE = 'AU06'	Gifts	Solicit_code	=	AU06
Has gift(s) with solicitation codes that start with "AU".	DPGIFT.SOLICIT_CODE LIKE 'AU%'	Gifts	Solicit_code	Begins with	AU
Has at least one gift that is not this solicitation code.	DPGIFT.SOLICIT_CODE <> 'AU06'	Gifts	Solicit_code	<>	AU06

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7. Working with Reports

DonorPerfect Online Reports allow you to work with your data in a wide variety of ways:

- Contact Manager Reports - These reports track the contacts that have occurred between your donors and your organization.
- Custom Reports – The Custom Report Writer module allows you to create your own tabular reports.
- Financial Reports - These reports are focused on the financial operations of your organization, and allow you to analyze your donors and donations.
- Listings - These reports display lists of information about your donors.
- Membership Reports - These reports allow you to track membership in your organization.

Contact Management Reports

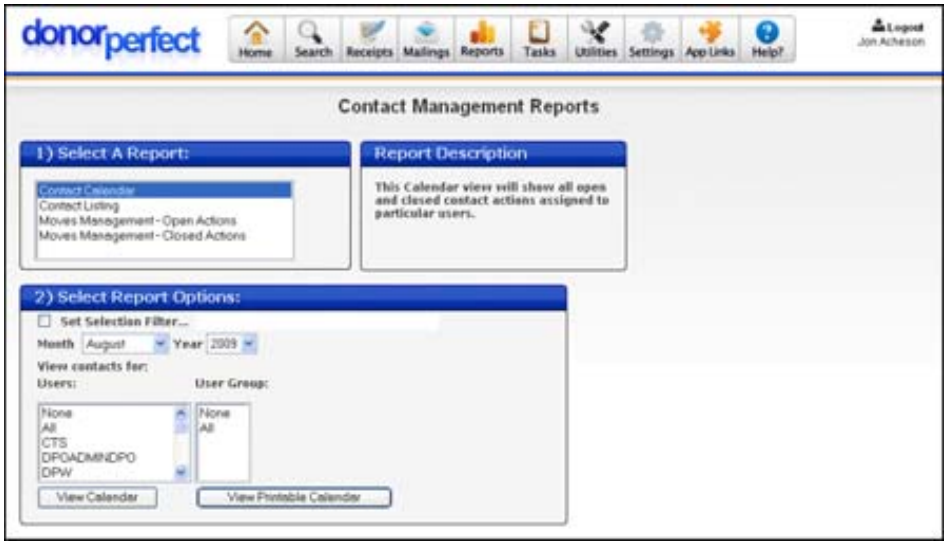
The **Contact Manager Reports** enable users to see either a Calendar View or a Report View of all contacts. The Calendar View gives a general overview of all contacts, open and closed. The open contacts are printed in red, and the closed contacts are printed in black.

This section also contains **Moves Management Reports** that help you manage actions in your Moves Management Plans. For more details, see page 294.

Viewing Contact Manager Reports

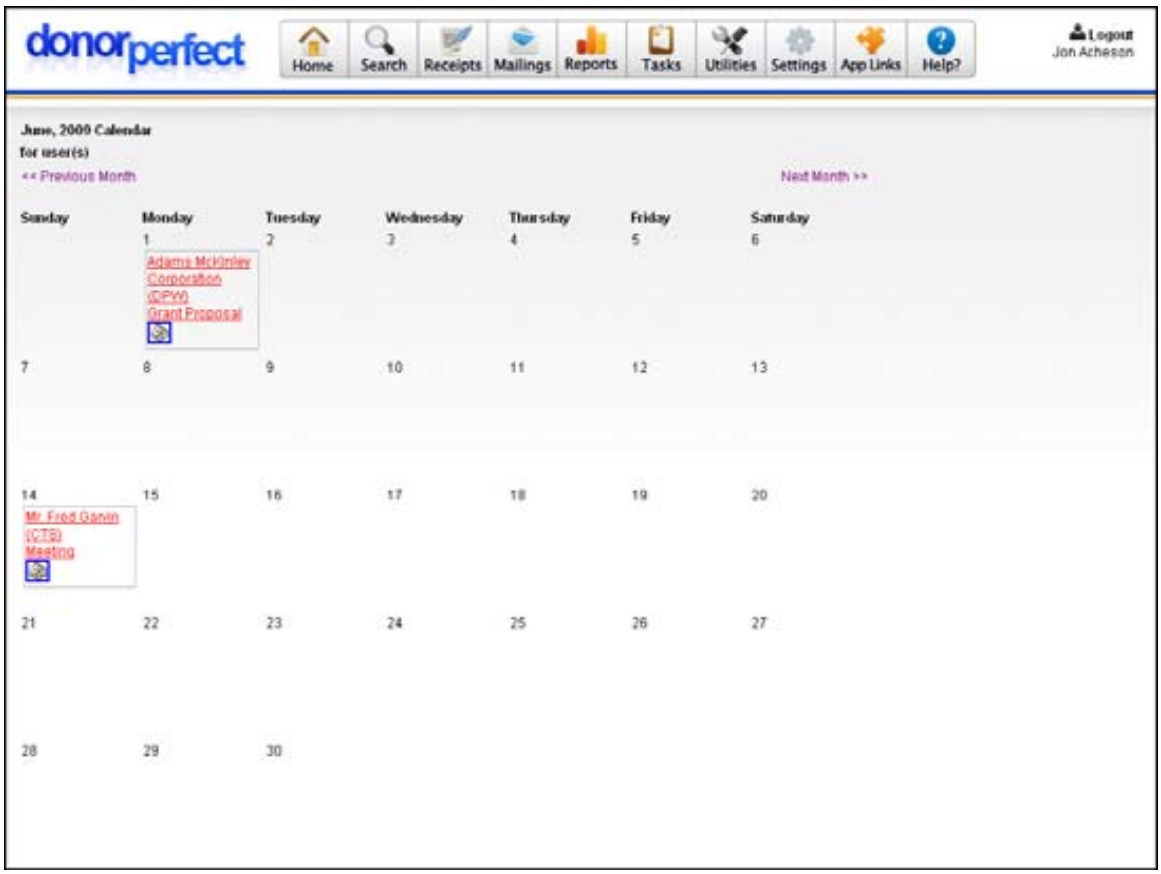
Contact Calendar Report

You can view all of the contacts in your system in a calendar format, making it easy to see what contacts are due or have been completed.



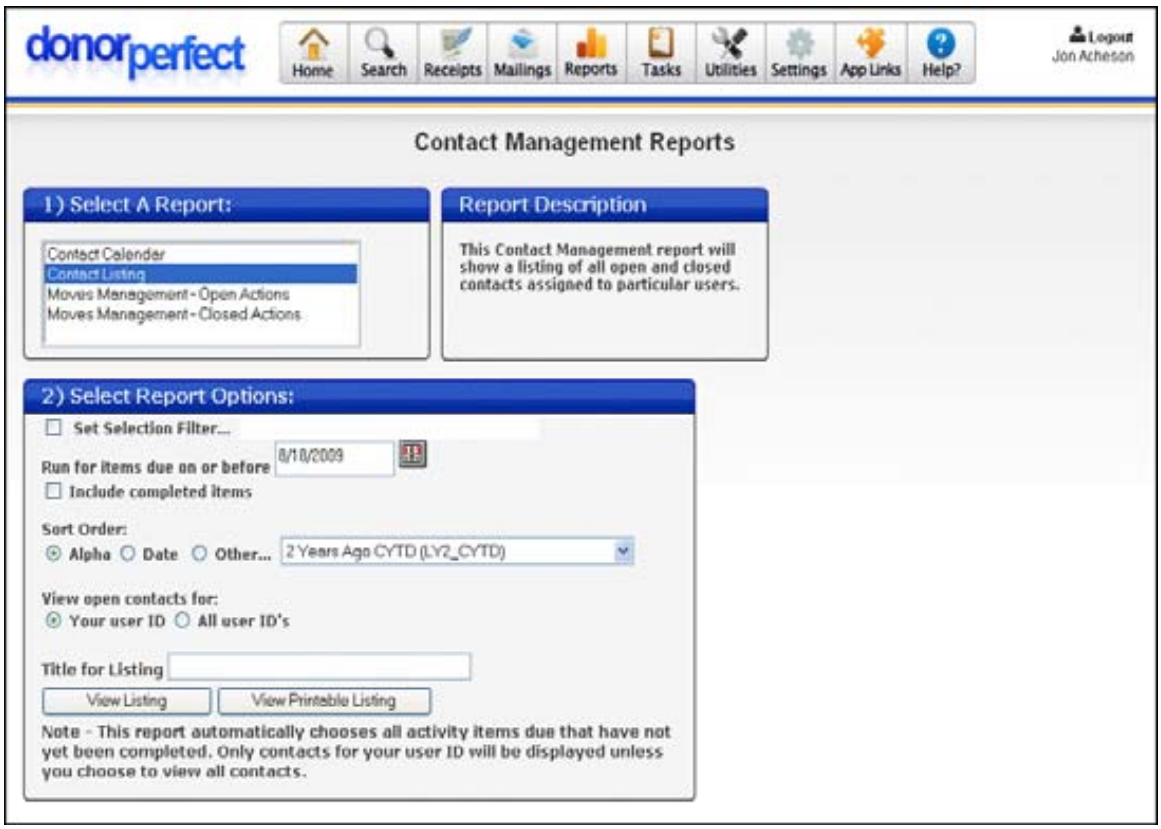
▶ To see the calendar view

1. Select **Reports**, and then click **Contact Manager**.
2. In the **Select a Report** section, choose **Contact Calendar**.
3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Select the appropriate **Month** and **Year** for the contacts you want to view.
5. Select the **Users** and **User Groups** whose contacts are to be viewed (see "User Security Administration" on page 412 for details on User Groups).
6. Click the **View Calendar** button or the **View Printable Calendar** button.



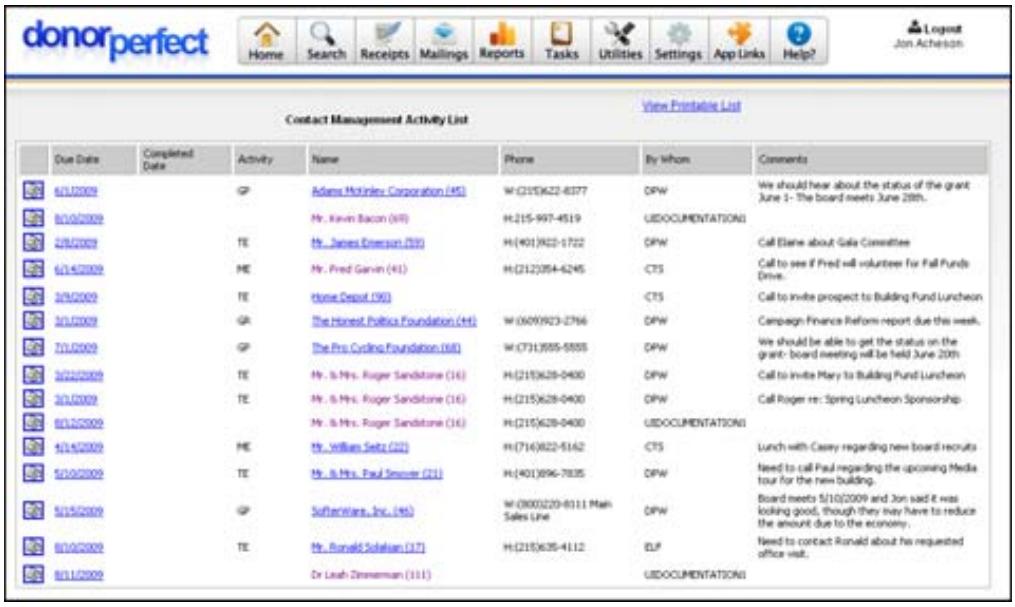
Viewing Contacts in a Listing

You can view all of the contacts in your system in a report.



▶ To see the listing view

1. Click **Reports**, and then click **Contact Manager**.
2. In the **Select a Report** section, choose **Contact Listing**.
3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. In the **Run for items due on or before** field, enter the date on and before which you want to see contacts.
5. If you want to include items that have already been completed, select the **Include Completed Items** check box.
6. Select the sort order:
   - Select **Alpha** to sort contacts alphabetically by donor.
   - Select **Date** to sort by contact date.
   - Select **Other** to select some other field from the database to sort on.
7. To see only your contacts, click **Your user ID**. To see contacts for everyone in the system, click **All user ID's**.
8. Enter a **Title for Listing**, if desired.
9. Click the **View Listing** button or the **View Printable Listing** button.



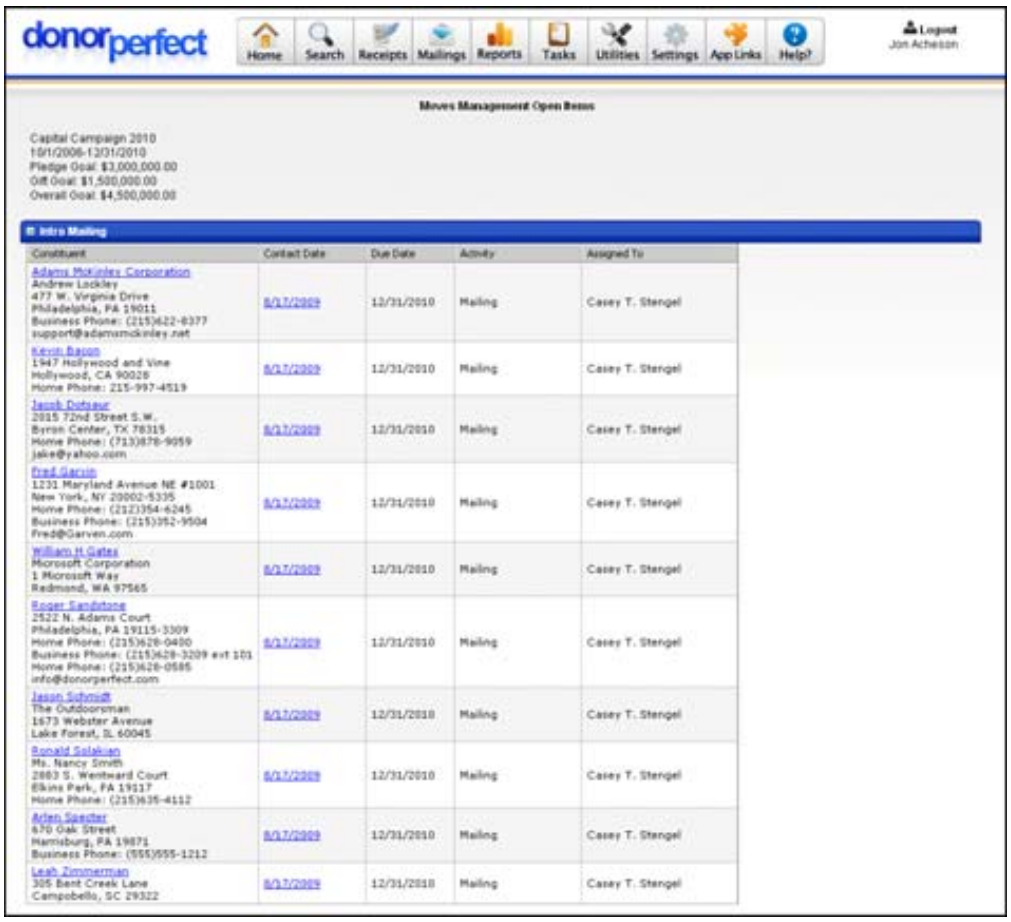
Moves Management Reports

To help you track the actions and effectiveness of your Moves Management Plans, there are two reports you can run in the Contact Manager section.

Note: To view a financial analysis and comparison of your Moves Management Plans, you can also run two Moves Management Reports in the Financial Reports section of the system—see page 246 for details.

Moves Management – Open Actions

The **Move**s Management – Open Actions Report shows the open actions for the Moves Management Plan you select. For each action in the plan, it shows you the Constituent, Contact Date, Due Date, Activity, and Assigned To information.

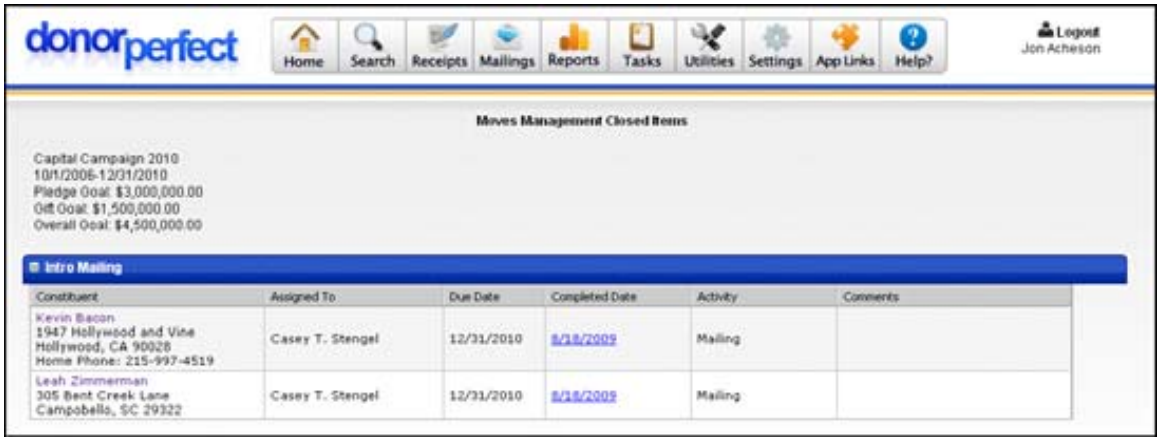


▶ To view the Moves Management – Open Actions Report

1. Click **Reports**, and then click **Contact Manager.**
2. In the **Select a Report** section, choose **Moves Management – Open Actions**.
3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. From the **Plan** pull-down, choose the Moves Management Plan you want to see the open actions for.
5. If you want to limit the actions you see to only those assigned to a specific user in your system, choose the user from the **Assigned To** pull-down.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
7. Click the **View Report** button.

Moves Management – Closed Actions

The **Moves Management – Closed Actions Report** shows the closed actions for the Moves Management Plan you select. For each action in the plan, it shows you the Constituent, Due Date, Completed Date, Activity, Comments, and Assigned To information for each contact record created for the action.



▶ To view the Moves Management – Closed Actions Report

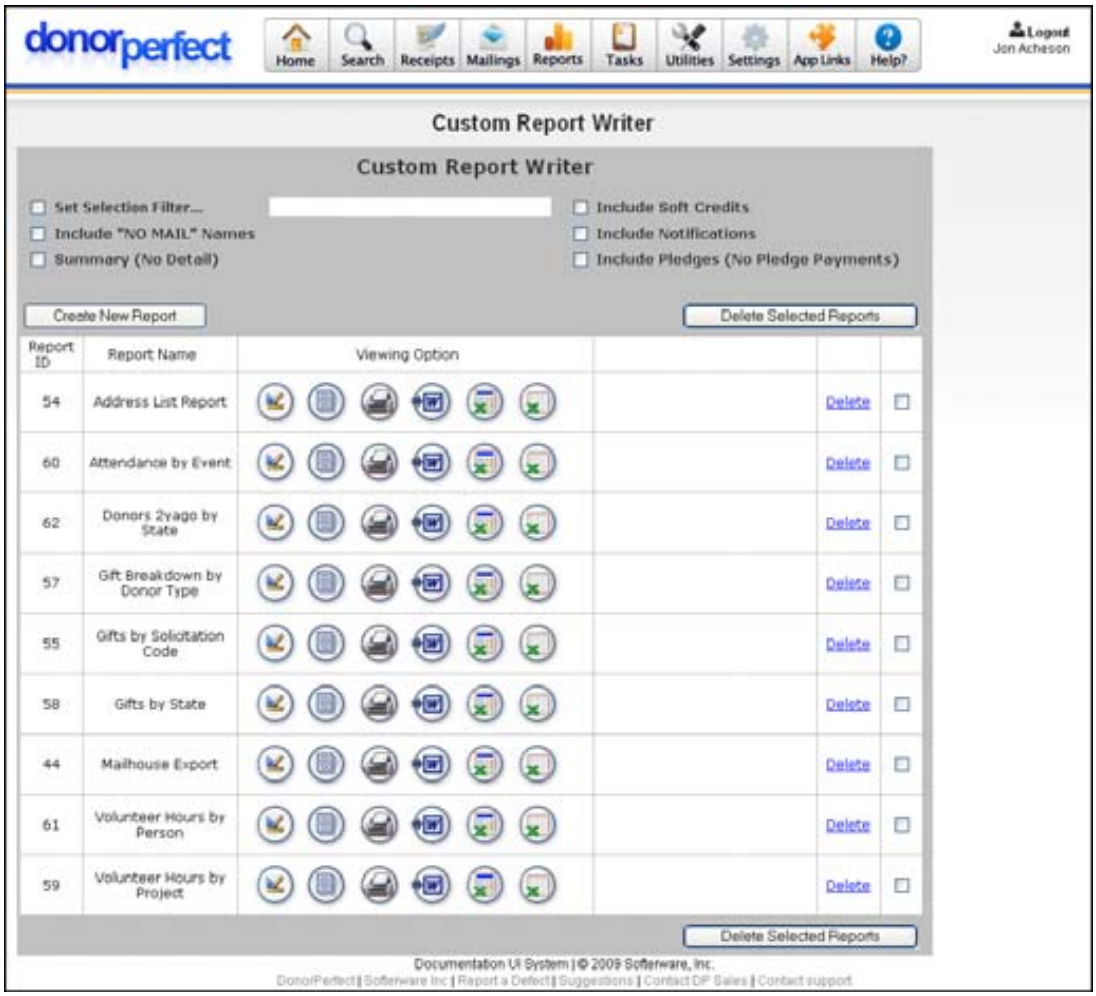
1. Click **Reports**, and then click **Contact Manager.**
2. In the **Select a Report** section, choose **Moves Management – Closed Actions**.
3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. From the **Plan** pull-down, choose the Moves Management Plan you want to see the closed actions for.
5. If you want to limit the actions you see to only those assigned to a specific user in your system, choose the user from the **Assigned To** pull-down.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
7. Click the **View Report** button.

Custom Report Writer

Note: The Custom Report Writer is purchased separately and can be obtained by contacting your DonorPerfect sales representative.

When you find that you need a report and the Listings, Financial Reports, and Batch Listing do not show the fields that you need, try using the Custom Report Writer to create a report.

From the navigation bar**,** select **Reports** and click **Custom Report Writer**.



From this screen, you can carry out the following operations:

- Create a new custom report (See "Creating a Custom Report," page 190)
- Edit an existing report (See "Editing a Custom Report" page 195)
- Deleting custom reports (see "Deleting Custom Reports" page 195)
- Output custom reports in a variety of formats (See "Outputting Custom Reports" page 196)

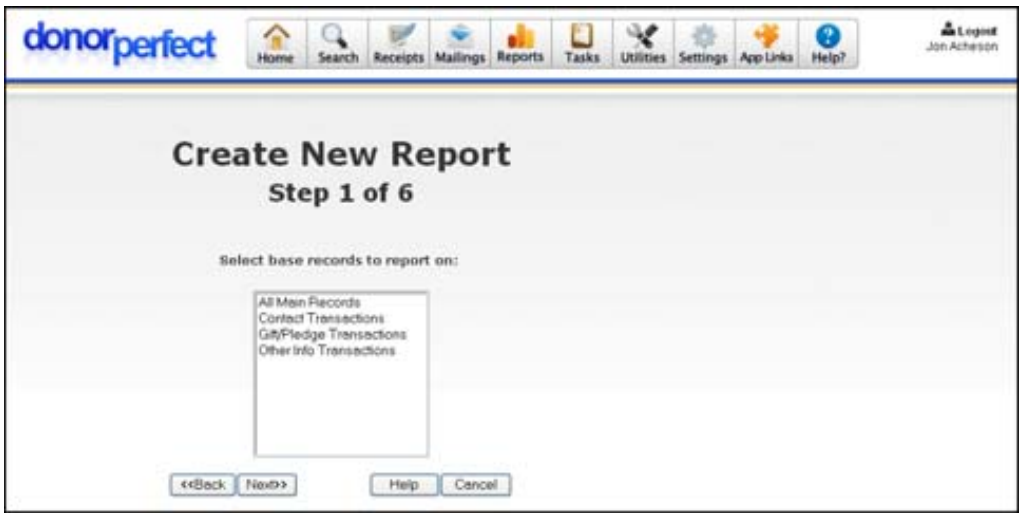
Creating a Custom Report

There are six steps to creating a custom report in DonorPerfect Online. The following sections walk you through each step.

Step 1—Select the Type of Data

▶ To create a new report

1. Click **Create New Report**.



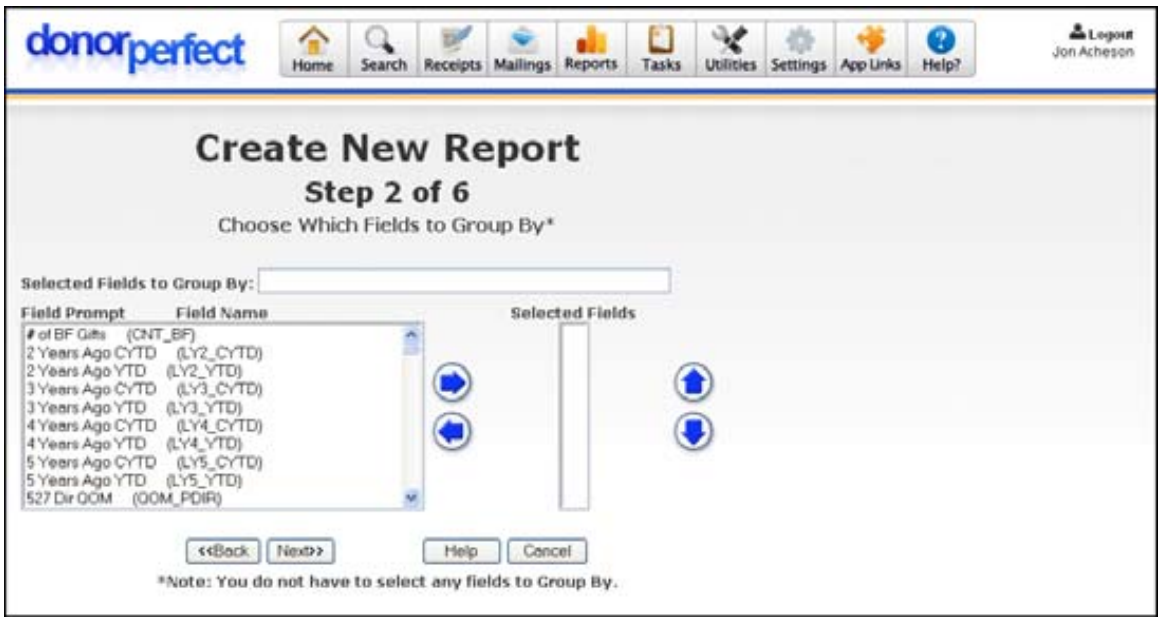
2. Select what type of report you are creating:
   - If you are planning to create a report that prints fields from the Main Screen/Bio Screen, then you need to click **All Main Records**.
   - If you want a report with transactions from the Contact screen, then click **Contact Transactions**.
   - To include fields from the Gift or Pledge screens, click **Gift/Pledge Transactions.**
   - For Other Information, click **Other Info Transactions.**

Note: You must include at least one field from the DP table that corresponds to the base report you choose.

3. Click **Next.**

Step 2—Choose Which Fields to Group By

In a custom report, you can choose to "group" your data by something that the data has in common. Grouping is optional. If you do not wish to Group, proceed to the next step.



▶ To choose which fields to group by

1. To select the field or fields that you want to group by, click once on the field and then click the button, or double-click on each field you want to group by.

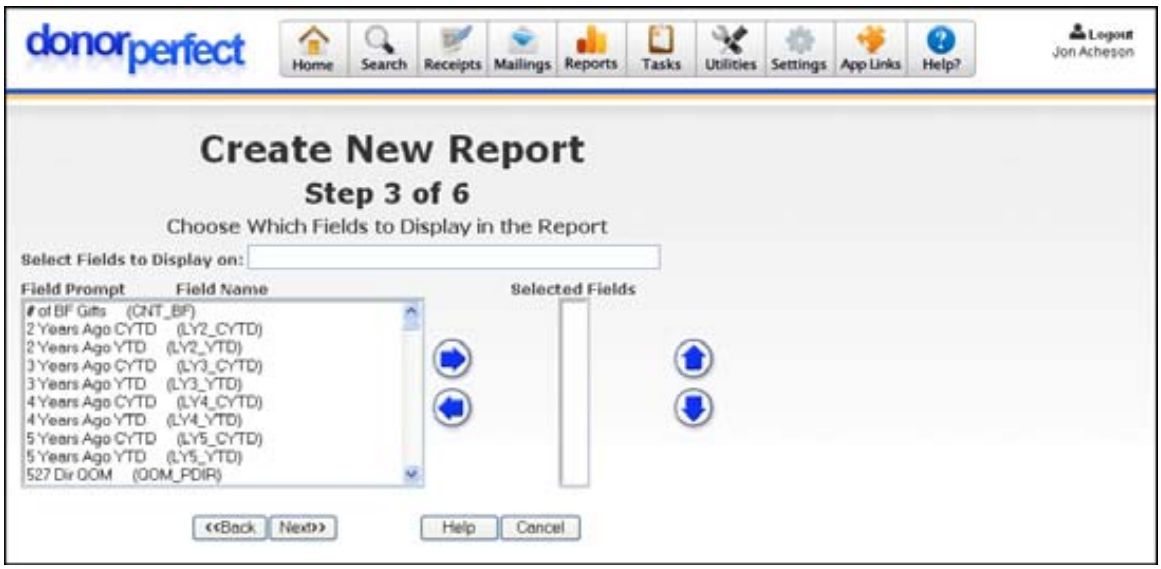
   For example, if you wanted to group the donors by the state that they live in, double-click on the **State** field. Another example would be if you were printing gift information. You could also group the data by the General Ledger codes or the Solicitation Codes.

2. To remove a field from the **Selected Fields** list, select the field and click the button, or double-click on it in the **Selected Fields** list.

3. To reorder the entries in the **Selected Fields** list, select an entry and use the up and down arrows ( ) to move it to its desired position.

4. When finished, click **Next.**

Step 3—Choose Which Fields to Display in the Report



Step 3 shows you the fields that you can include in your report. The available fields are dependent on the selections you made in step 1:

- In step 1 of 6, if your report was set to **All Main Records**, then the list of Available Fields will be from the Main and Bio screens.
- If your report is set to **Contact Transactions**, then the Available Fields list will consist of fields from the Main, Bio, and the Contact Screens.
- If your report is set to **Gift/Pledge Transactions**, then the Available Fields list will consist of fields from the Main, Bio, Gift, and Pledge Screens.
- If your report is set to **Other Info Transactions**, then the Available Fields list will consist of fields from the Main, Bio, and Other Info Screens.

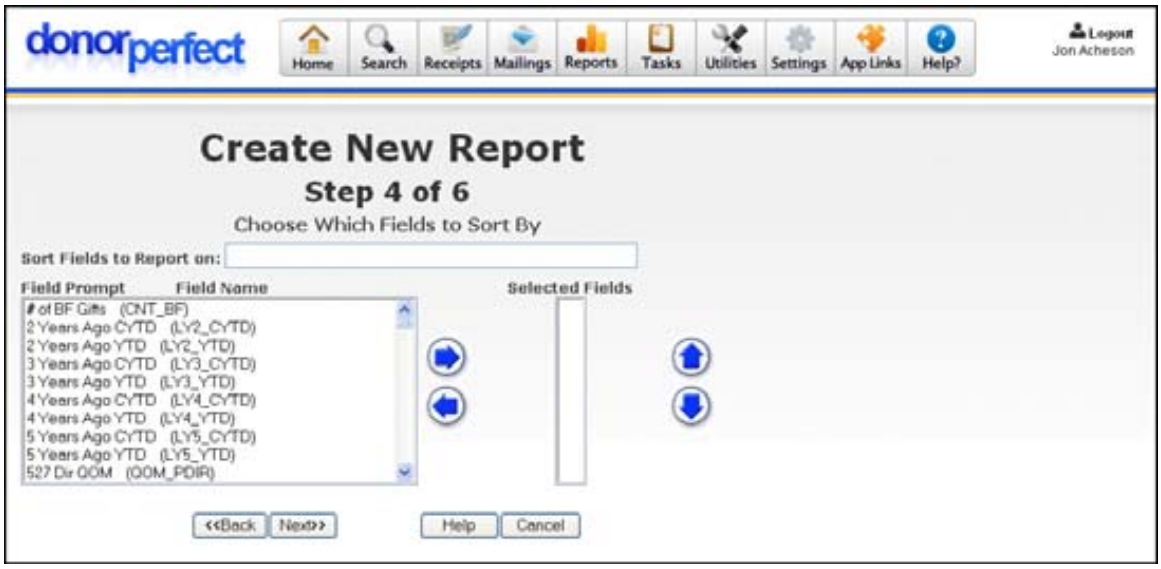
▶ To choose which fields to display in the report

1. To select the fields to include in your report, click once on each field and then click the button, or double-click on each field you want to include.
2. To remove a field from the **Selected Fields** list, select the field and click the button, or double-click on it in the **Selected Fields** list.
3. To reorder the entries in the **Selected Fields** list, select an entry and use the up and down arrows ( ) to move it to its desired position.
4. Once you have selected all the fields that you want on your report, click **Next**.

Step 4—Choose Which Fields to Sort By

Sort Order is the order that you want to display the data on the report. Alphabetical Order is an example of a Sort Order. To have your report print in Alpha Order, select Last Name and First Name. If you set up a Data Grouping in Step 2, then the sort order will be reset at the beginning of each new group. For example, the data could be in Alpha order within the group.

Note: You can't sort your custom report by the same fields used to group in step 2.

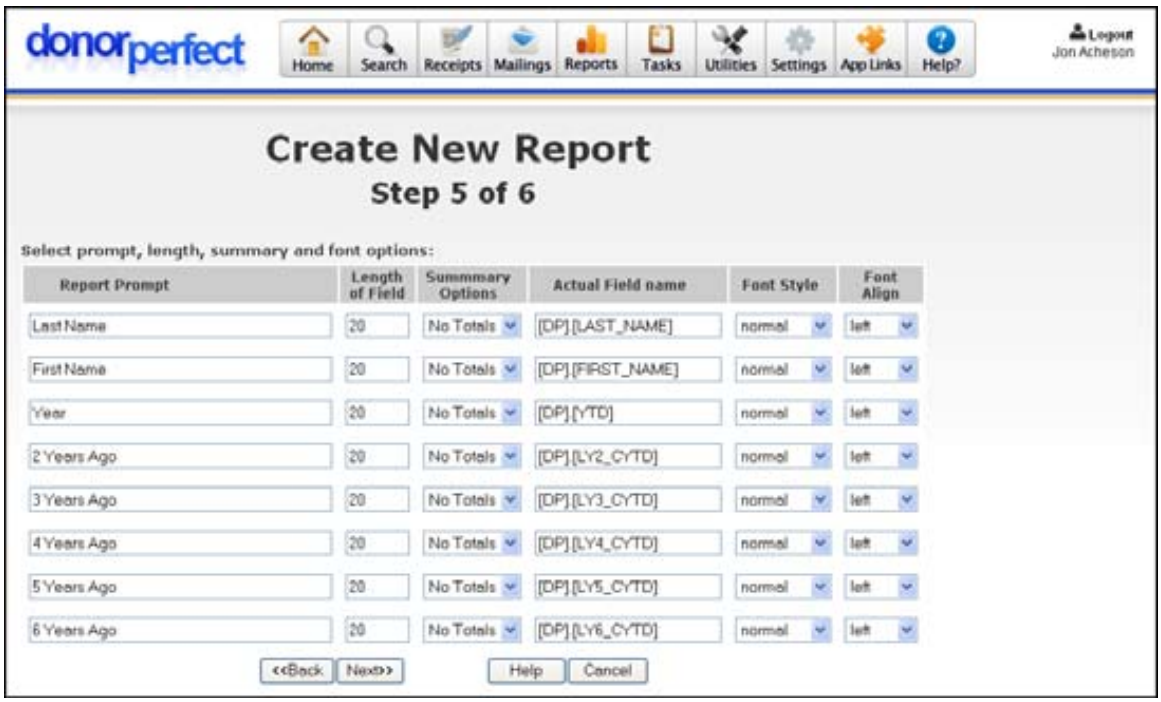


▶ To choose which fields to sort by

1. To select the fields to sort the report with, click once on each field and then click on the button, or double-click on each field you want to sort by.
2. To remove a field from the **Selected Fields** list, select the field and click the button, or double-click on it in the **Selected Fields** list.
3. To reorder the entries in the **Selected Fields** list, select an entry and use the up and down arrows ( ) to move it to its desired position.
4. Once you have selected all the fields that you want to sort by, click **Next**.

Step 5—Select Field Display Options

This step shows the fields that are going to display on your report. The Report Prompt, Length of Field, Summary Options, and Actual Field Name will be automatically filled in by the system.



▶ To select prompt, length, and summary options

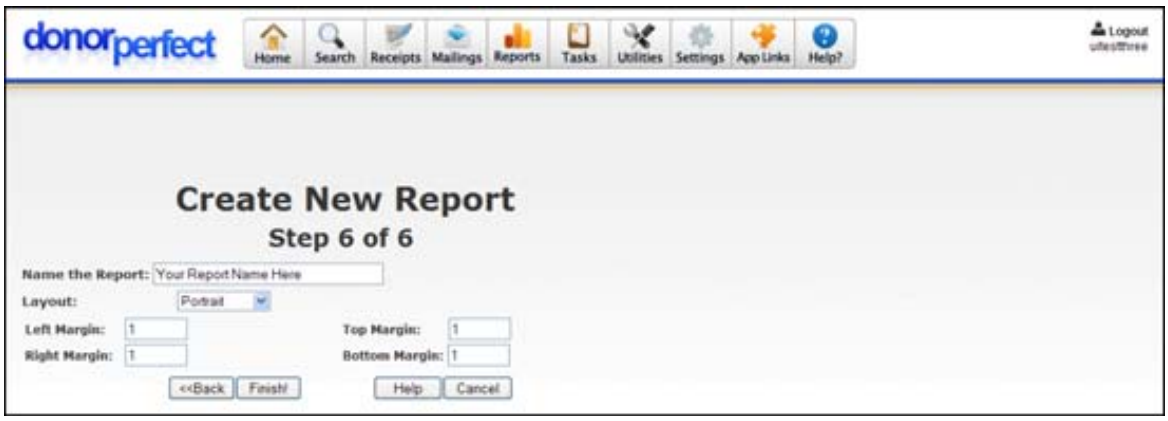
1. The following settings are available for each selected field:

Report Prompt	In the report, each field will be displayed in its own column. The Report Prompts are the text that will appear in the headers of those columns.
Length of Field	The approximate width of the column. The width of the column will be specified as nine times this many pixels. Actual column widths may vary depending on the contents of the fields. You may change the length if needed.
Summary Options	Select one of the following options: • Average - The average of the values for this field. • Sum - The sum of the values for this field. • Count - The number of records in the report. • No Totals - Don't calculate anything for this field. The calculated values, if any, will display at the bottom of the column for that field. A value will be calculated for each group, and at the end of the report, it will be calculated once for all records.
Actual Field Names	The names of the fields in DonorPerfect. Do not change the names!
Font Style	Character formatting for the field. Select **normal**, **bold**, *italic*, or ***bold italic***.
Font Align	The alignment of the text in the field. Choose **left**, **center**, or **right**.

2. Verify the settings for each field, and click **Next**.

Step 6—Printing Options

This step allows you to define the options for printing the report.



▶ To define printing options

1. In the **Name the Report** field, type the name of your report.
2. From the **Layout** pull-down, select either **Portrait** (vertical) or **Landscape** (horizontal).
3. Define the margins as necessary.
4. Click **Finish.** You will return to the Custom Report Screen.

Once you finish creating the report, it will appear in the list of reports in the Custom Report Writer screen.

Editing a Custom Report

▶ To edit a custom report

1. In the Custom Report Writer screen, click the button next to the name of the custom report you want to edit.
2. Edit the information for the report. The screens and fields are the same as when the report was created, except that you cannot edit the Source that was selected on the first screen.
3. When finished, navigate to the last screen and click the **Finish!** button to save your changes.

You can click **Cancel** on any screen to abandon your edits and return to the Custom Report Writer screen.

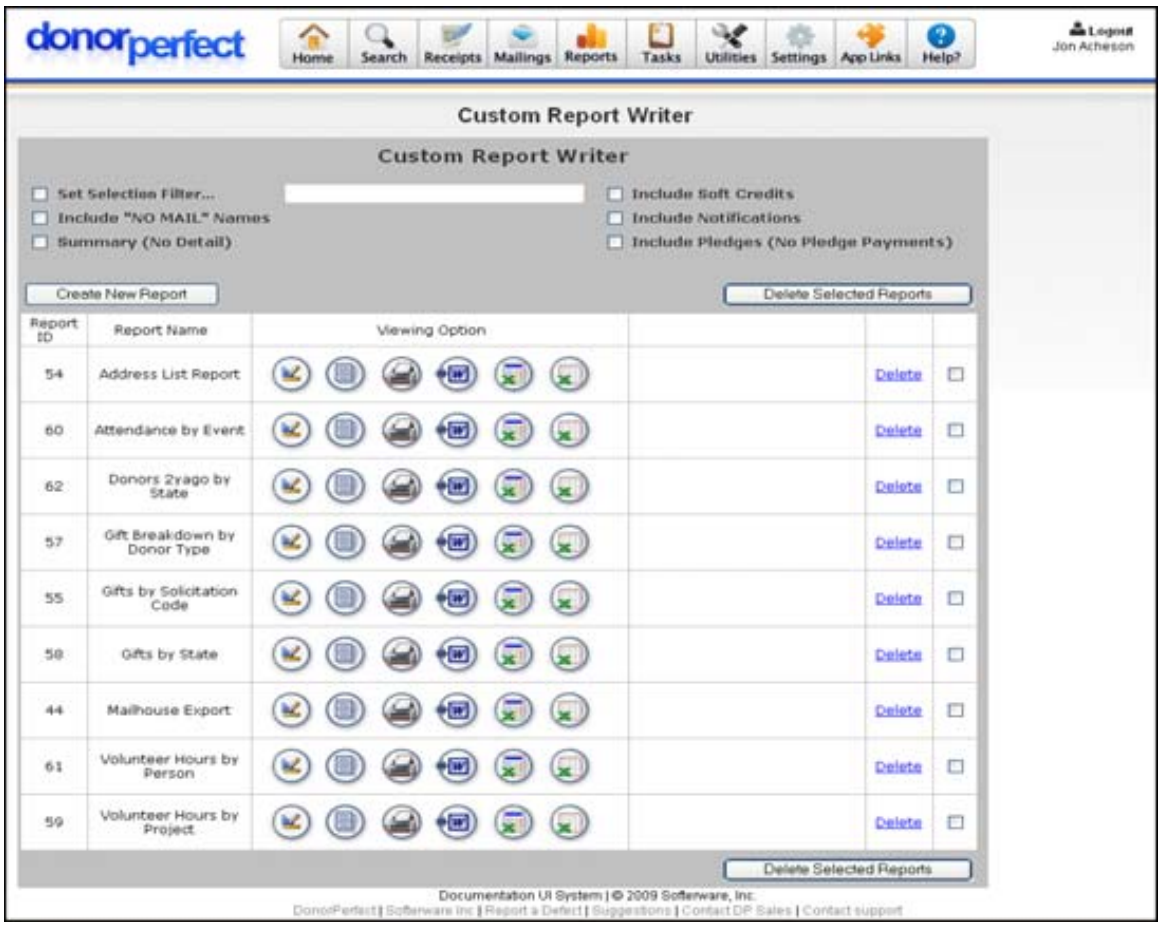
Deleting Custom Reports

▶ To delete a custom report

1. In the Custom Report Writer screen, click the Delete button to the right of the name of the custom report.
2. A confirmation screen will appear. Click **Yes** to confirm the deletion, or **No** to cancel the deletion.

You will be returned to the Custom Report Writer screen.

Outputting Custom Reports



▶ To output a custom report

1. Access the Custom Report Writer screen.
2. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
3. Check **Include "NO MAIL" Names** to include donors that are checked as "Do not Send Mail."
4. Check **Summary (No Detail)** if you would just like totals instead of detailed information.
5. Check **Include Soft Credits** to include soft credit records in the report. Soft credit records are not given special formatting to set them apart.
6. Check **Include Pledges (No Pledge Payments)** to include pledge records in the report. (Pledge payments are included in the report by default.) Pledge records are not given special formatting to set them apart.

Note: To identify soft credit or pledge records, include the RECORD_TYPE field in the report.

7. Click on one of the following buttons in the report listing to output the report:

Outputs the report as a normal page in DonorPerfect, complete with the standard navigation toolbar.

Outputs the report in a new browser window, in a printer-friendly format with the navigation toolbar removed.

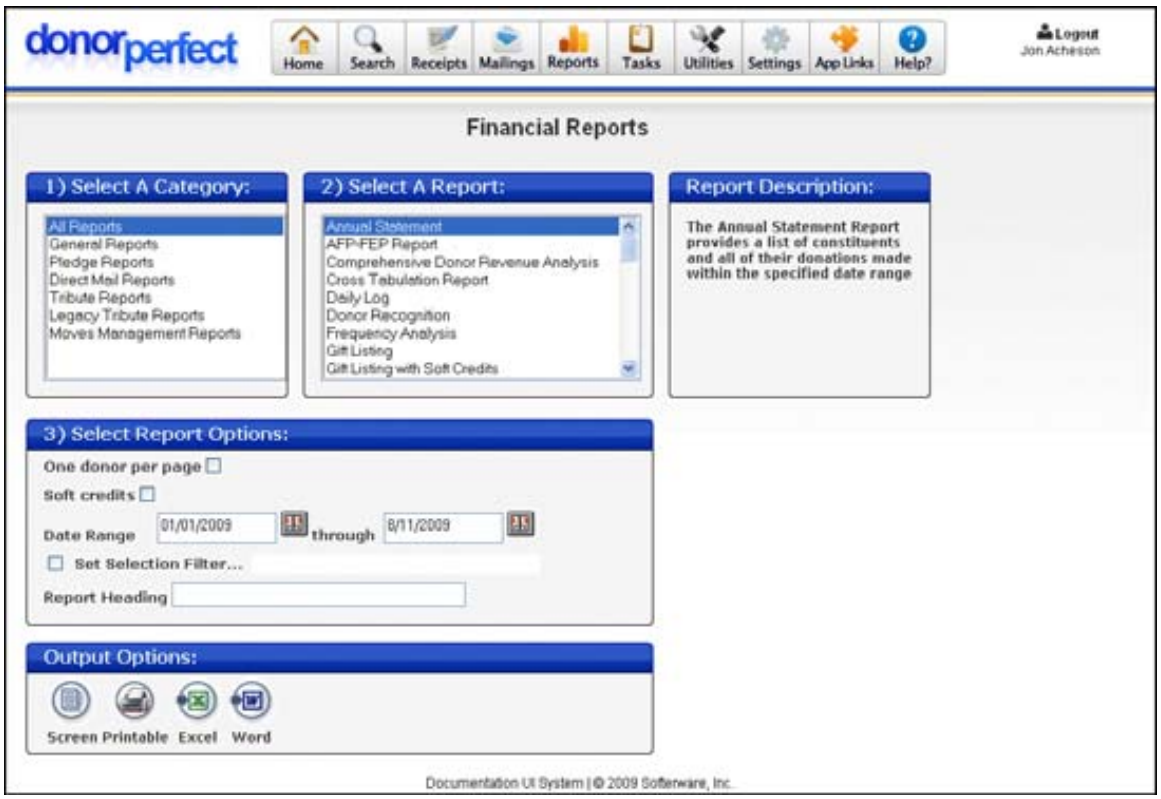
Outputs the report in Microsoft Word format. You will be prompted to open the report directly in Word, or save it as a file.

Outputs the report in Microsoft Excel format. You will be prompted to open the report directly in Excel, or save it as a file.

Outputs the report in Comma Separated Value (.CSV) format. You will be prompted to open the report directly in Excel, or save it as a file.

Financial Reports

The **Financial Reports Screen** allows you to select a report from a list. These reports are categorized into General Financial Reports, Pledge Reports, Direct Mail Reports, Tribute Reports, and Moves Management Reports. Each report within each category is described in detail within this section.



To access the screen, from the navigation bar, click on **Reports**, then select **Financial**.

Financial Report Screen Field Descriptions

The following options are available for financial reports:

- **Select a Category**: Financial Reports are divided into five categories—*General Reports*, *Pledge Reports*, *Direct Mail Reports*, *Tribute Reports*, and *Moves Management Reports*. Once you choose a category, the list of reports within it appears to the right in the **Select a Report** section.
- **Select a Report**: Lists all reports included in the report category chosen in the **Select a Category** section.
- **Ending Date:** Allows you to set ending date or range of dates.
- **Field to segment by:** Assigns grouping by segments, such as GL Code.
- **Use Donor Filter:** If you want to see all gifts for all donors based on certain criteria, you will need to use the donor filter.

- **Use Gift Filter:** If you only want to see certain gifts along with corresponding donors, you will need to use the gift filter.
- **Set Selection Filter:** If checked, you can establish criteria that must be met before a record is included in the report. For details on creating a selection filter, see "Using Selection Filters" on page 159.
- **Export to Excel:** If you view a report that contains a list of donors, a pull-down appears at the bottom of the report screen. This pull-down allows you to choose an export template you created for financial reports—this template details which fields should be included if you choose to export information from this report. To export a file with the settings you defined, choose the export template from the pull-down, click the **Export to Excel** button, and save the export file to the location that you want. For more details on export templates, see page 361.

Report Output Options

Four buttons appear in the **Output Options** section at the bottom of the Reports screens. Each button corresponds to a different output method for the report:

Outputs the report as a normal page in DonorPerfect, complete with the standard navigation toolbar.

Outputs the report as an HTML page in a new browser window, in a printer-friendly format with the navigation toolbar removed.

Outputs the report in Microsoft Excel format. You will be prompted to open the report directly in Excel, or save it as a file.

Outputs the report in Microsoft Word format. You will be prompted to open the report directly in Word, or save it as a file.

Drillable Reports

Many financial reports are *drillable*, which mean that they contains hyperlinks that allow you to click on a column entry and go to another page which provides more detailed information on that entry. Look for the blue hyperlinks in reports to find the drillable fields.

Instant Mailmerge

See "Instant Merge" page 451 for details on using the **Instant Mailmerge** button.

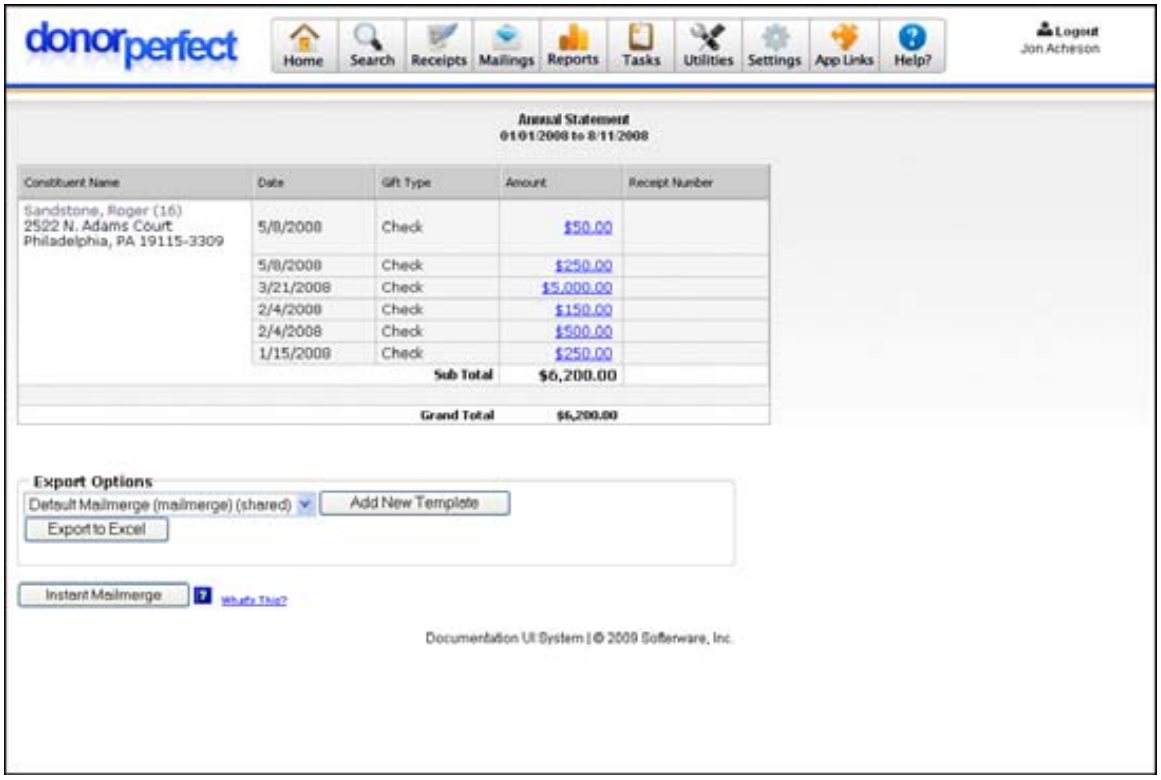
General Financial Reports

The following reports are available in the General Financial Reports category:

- Annual Statement
- AFP-Fundraising Effectiveness Report
- Comprehensive Donor Revenue Analysis
- Cross Tabulation Report
- Daily Log
- Donor Recognition
- Gift Listing
- Gift Listing with Linked Soft Credits
- GL Code Analysis
- Income Analysis With Gift Splits (Fiscal)
- Income Analysis With Gift Splits (Calendar)
- Linked Donor Contribution Report
- MTD/FYTD Summary (Fiscal)
- MTD/CYTD Summary (Calendar)
- Multi-Year Trend Analysis
- Periodic Gift Comparison
- Statistical Analysis
- Statistical Tabulation
- Top Donor Listing
- UK Gift Aid Report (up to 5/4/2008)
- UK Gift Aid Report (from to 6/4/2008)

Annual Statement Report

The Annual Statement Report provides a list of the donors who made donations within a specified date range. Each donation is listed separately.

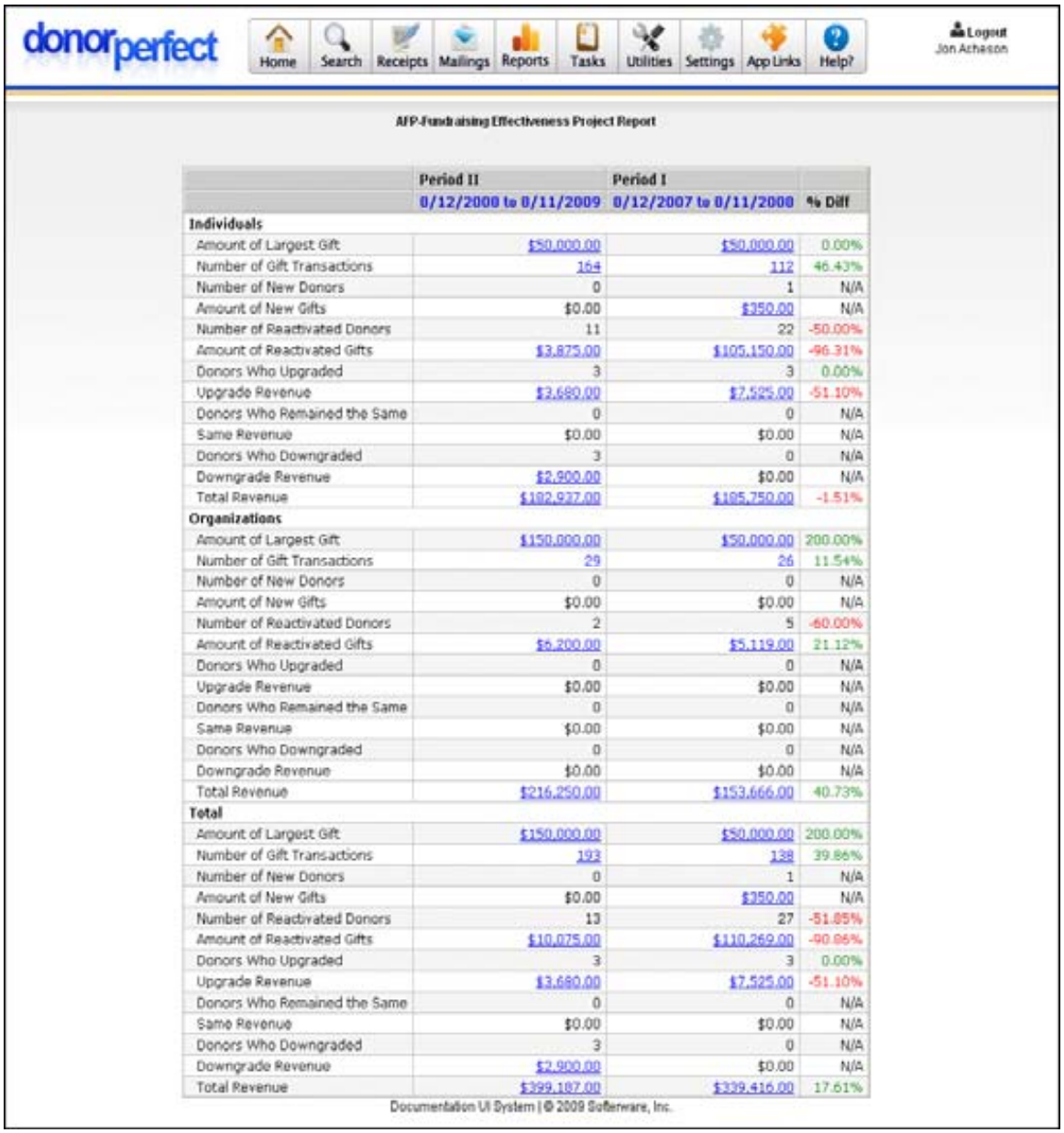


▶ To run the Annual Statement Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Annual Statement** in the Select a Report section.
2. Check **One donor per page** to generate a separate report page for each donor. If unchecked, multiple donors will appear on each page as space permits.
3. Check **Soft Credits** to include donations from a donor's company along with their personal donations.
4. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default.
5. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

AFP-Fundraising Effectiveness Report

Created in conjunction with the AFP Fundraising Effectiveness Project, this comprehensive report contains a number of key metrics used by AFP professionals.



donorperfect — Home | Search | Receipts | Mailings | Reports | Tasks | Utilities | Settings | App Links | Help? — Logout Jon Acheson

AFP-Fundraising Effectiveness Project Report

	Period II 0/12/2008 to 0/11/2009	Period I 0/12/2007 to 0/11/2008	% Diff
Individuals			
Amount of Largest Gift	$50,000.00	$50,000.00	0.00%
Number of Gift Transactions	164	112	46.43%
Number of New Donors	0	1	N/A
Amount of New Gifts	$0.00	$350.00	N/A
Number of Reactivated Donors	11	22	-50.00%
Amount of Reactivated Gifts	$3,875.00	$105,150.00	-96.31%
Donors Who Upgraded	3	3	0.00%
Upgrade Revenue	$3,680.00	$7,525.00	-51.10%
Donors Who Remained the Same	0	0	N/A
Same Revenue	$0.00	$0.00	N/A
Donors Who Downgraded	3	0	N/A
Downgrade Revenue	$2,900.00	$0.00	N/A
Total Revenue	$182,937.00	$185,750.00	-1.51%
Organizations			
Amount of Largest Gift	$150,000.00	$50,000.00	200.00%
Number of Gift Transactions	29	26	11.54%
Number of New Donors	0	0	N/A
Amount of New Gifts	$0.00	$0.00	N/A
Number of Reactivated Donors	2	5	-60.00%
Amount of Reactivated Gifts	$6,200.00	$5,119.00	21.12%
Donors Who Upgraded	0	0	N/A
Upgrade Revenue	$0.00	$0.00	N/A
Donors Who Remained the Same	0	0	N/A
Same Revenue	$0.00	$0.00	N/A
Donors Who Downgraded	0	0	N/A
Downgrade Revenue	$0.00	$0.00	N/A
Total Revenue	$216,250.00	$153,666.00	40.73%
Total			
Amount of Largest Gift	$150,000.00	$50,000.00	200.00%
Number of Gift Transactions	193	138	39.86%
Number of New Donors	0	1	N/A
Amount of New Gifts	$0.00	$350.00	N/A
Number of Reactivated Donors	13	27	-51.85%
Amount of Reactivated Gifts	$10,075.00	$110,269.00	-90.86%
Donors Who Upgraded	3	3	0.00%
Upgrade Revenue	$3,680.00	$7,525.00	-51.10%
Donors Who Remained the Same	0	0	N/A
Same Revenue	$0.00	$0.00	N/A
Donors Who Downgraded	3	0	N/A
Downgrade Revenue	$2,900.00	$0.00	N/A
Total Revenue	$399,187.00	$339,416.00	17.61%

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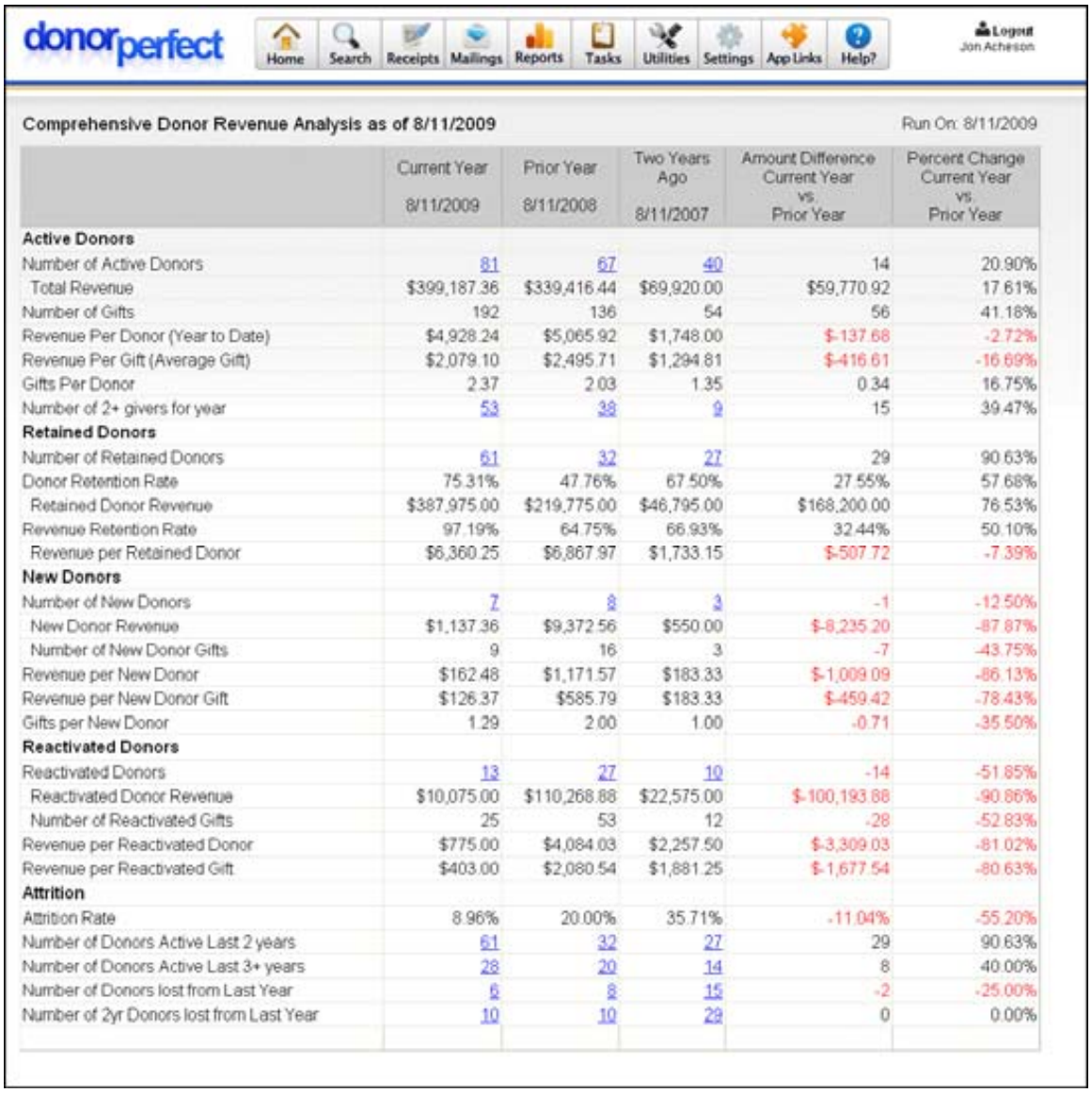
▶ To run the AFP Fundraising Effectiveness Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **AFP-FEP Report** in the **Select a Report** section.
2. Enter the **Ending Date** for the report.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.

4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Comprehensive Donor Revenue Analysis Report

The **Comprehensive Donor Revenue Analysis Report** is designed to give you an overall view of your database. As with all of DPO's financial reports, you will have the option of applying a filter that will provide a more focused view of your data.



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Comprehensive Donor Revenue Analysis as of 8/11/2009 Run On: 8/11/2009

	Current Year 8/11/2009	Prior Year 8/11/2008	Two Years Ago 8/11/2007	Amount Difference Current Year vs Prior Year	Percent Change Current Year vs Prior Year
Active Donors					
Number of Active Donors	81	67	40	14	20.90%
Total Revenue	$399,187.36	$339,416.44	$69,920.00	$59,770.92	17.61%
Number of Gifts	192	136	54	56	41.18%
Revenue Per Donor (Year to Date)	$4,928.24	$5,065.92	$1,748.00	$-137.68	-2.72%
Revenue Per Gift (Average Gift)	$2,079.10	$2,495.71	$1,294.81	$-416.61	-16.69%
Gifts Per Donor	2.37	2.03	1.35	0.34	16.75%
Number of 2+ givers for year	53	38	9	15	39.47%
Retained Donors					
Number of Retained Donors	61	32	27	29	90.63%
Donor Retention Rate	75.31%	47.76%	67.50%	27.55%	57.68%
Retained Donor Revenue	$387,975.00	$219,775.00	$46,795.00	$168,200.00	76.53%
Revenue Retention Rate	97.19%	64.75%	66.93%	32.44%	50.10%
Revenue per Retained Donor	$6,360.25	$6,867.97	$1,733.15	$-507.72	-7.39%
New Donors					
Number of New Donors	7	8	3	-1	-12.50%
New Donor Revenue	$1,137.36	$9,372.56	$550.00	$-8,235.20	-87.87%
Number of New Donor Gifts	9	16	3	-7	-43.75%
Revenue per New Donor	$162.48	$1,171.57	$183.33	$-1,009.09	-86.13%
Revenue per New Donor Gift	$126.37	$585.79	$183.33	$-459.42	-78.43%
Gifts per New Donor	1.29	2.00	1.00	-0.71	-35.50%
Reactivated Donors					
Reactivated Donors	13	27	10	-14	-51.85%
Reactivated Donor Revenue	$10,075.00	$110,268.88	$22,575.00	$-100,193.88	-90.86%
Number of Reactivated Gifts	25	53	12	-28	-52.83%
Revenue per Reactivated Donor	$775.00	$4,084.03	$2,257.50	$-3,309.03	-81.02%
Revenue per Reactivated Gift	$403.00	$2,080.54	$1,881.25	$-1,677.54	-80.63%
Attrition					
Attrition Rate	8.96%	20.00%	35.71%	-11.04%	-55.20%
Number of Donors Active Last 2 years	61	32	27	29	90.63%
Number of Donors Active Last 3+ years	28	20	14	8	40.00%
Number of Donors lost from Last Year	6	8	15	-2	-25.00%
Number of 2yr Donors lost from Last Year	10	10	29	0	0.00%

The Comprehensive Donor Revenue Analysis Report provides 26 different calculations, including:

- Number of Active Donors
- Total Giving

- Donor Retention Rate
- Retained Donor Revenue
- New Donors
- New Donor Revenue
- Attrition Rate

▶ To run the Comprehensive Donor Revenue Analysis Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Comprehensive Donor Revenue Analysis** in the **Select a Report** section.
2. Enter the **Ending Date** for the report.
3. Choose either **Use Donor Filter** (if your selection filter is filtering by donor) or **Use Gift Filter** (if your selection filter is filtering by gift).
4. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the ending date in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Cross Tabulation Report

The Cross Tabulation Report allows you to quickly compare any two coded fields side by side. For example, you could compare Solicitation Codes against GL codes, in order to see how a particular solicitation might have contributed to fundraising.

SOLICIT CODE	Count	Sum	Count	Sum	Count	Sum	Count	Sum
			Building Fund		Unrestricted		Total	
	10	$1,079.36	0	$0.00	1	$230.00	11	$1,309.36
0	0	$0.00	1	$100.00	1	$400.00	2	$500.00
Fall Banquet 2008	0	$0.00	0	$0.00	6	$1,150.00	6	$1,150.00
Golf Tournament 2009	0	$0.00	0	$0.00	32	$8,750.00	32	$8,750.00
Personal Solicitation	0	$0.00	4	$5,000.00	3	$250,000.00	7	$255,000.00
Winter Mailing 2009	0	$0.00	0	$0.00	58	$39,265.00	58	$39,265.00
Total	10	$1,079.36	5	$5,100.00	101	$299,795.00	116	$305,974.36

▶ To run the Cross Tabulation Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Cross Tabulation Report** in the **Select a Report** section.
2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default.
3. Select the field to show along the left edge of the table from the **Field to show along left** list.
4. Select the field to show along the top edge of the table from the **Field to show along top** field.
5. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Daily Log Report

The Daily Log report provides a quick listing of all donors and gifts entered into DonorPerfect Online over a given date range. This gives a quick overview of the activity in the system.

▶ To run the Daily Log Report

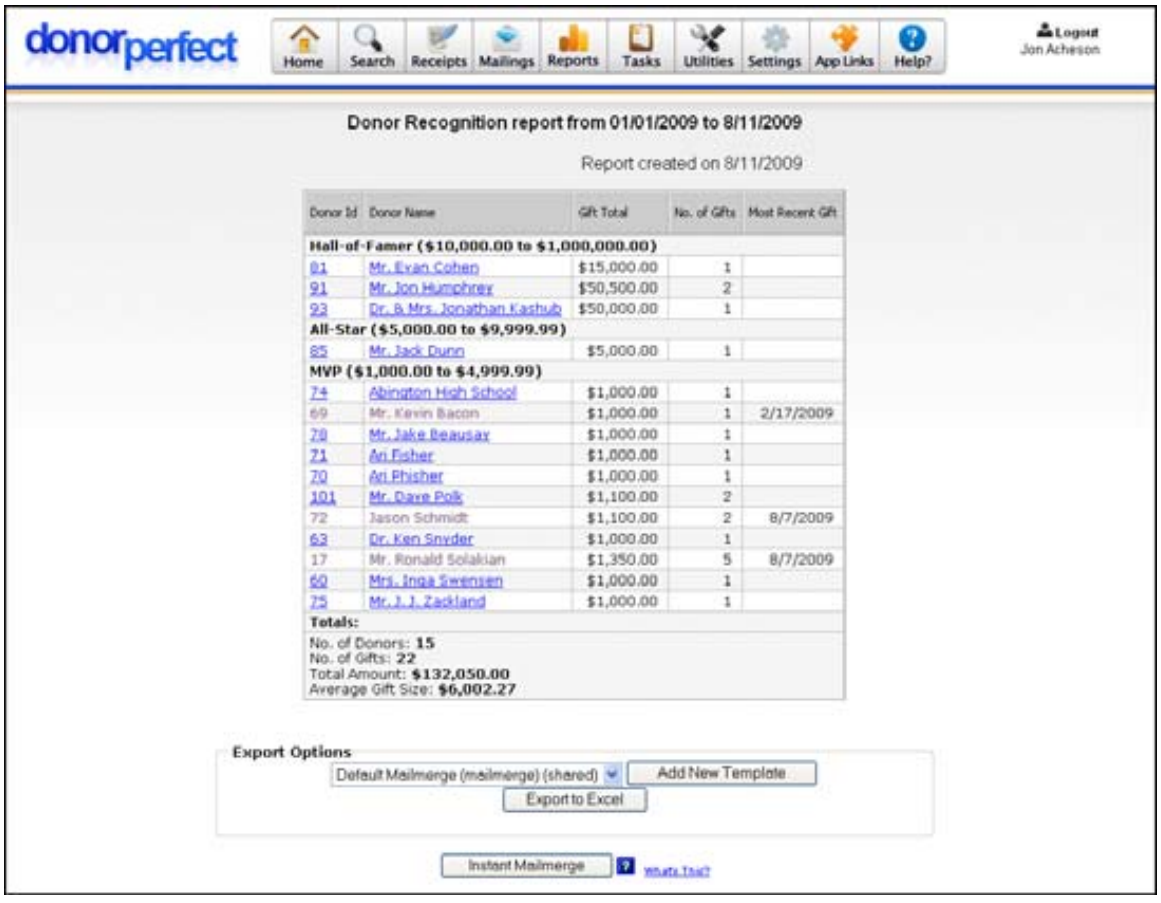
1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Daily Log** in the **Select a Report** section.
2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default.

3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Donor Recognition Report

The Donor Recognition Report allows you to break out which donors are contributing at different giving levels. This is particularly useful if you give out different membership levels or thank you letters for different donation levels.

Once you have run the Donor Recognition Report, you then have the option to export the donor records in Excel format for use in a mail merge.



▶ To run the Donor Recognition Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Donor Recognition** in the **Select a Report** section.

2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default.
3. Enter the range of values for each donor contribution level, along with a name for the contribution level.

Note: DonorPerfect Online will remember the levels that you enter, so that the next time you run this report, you will not have to re-enter them.

4. Check **Include Gift amounts and Totals** to calculate the total giving by each donor, as well as a set of overall totals (see example above). If this option is not selected, you will simply see a list of the names in each category.
5. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

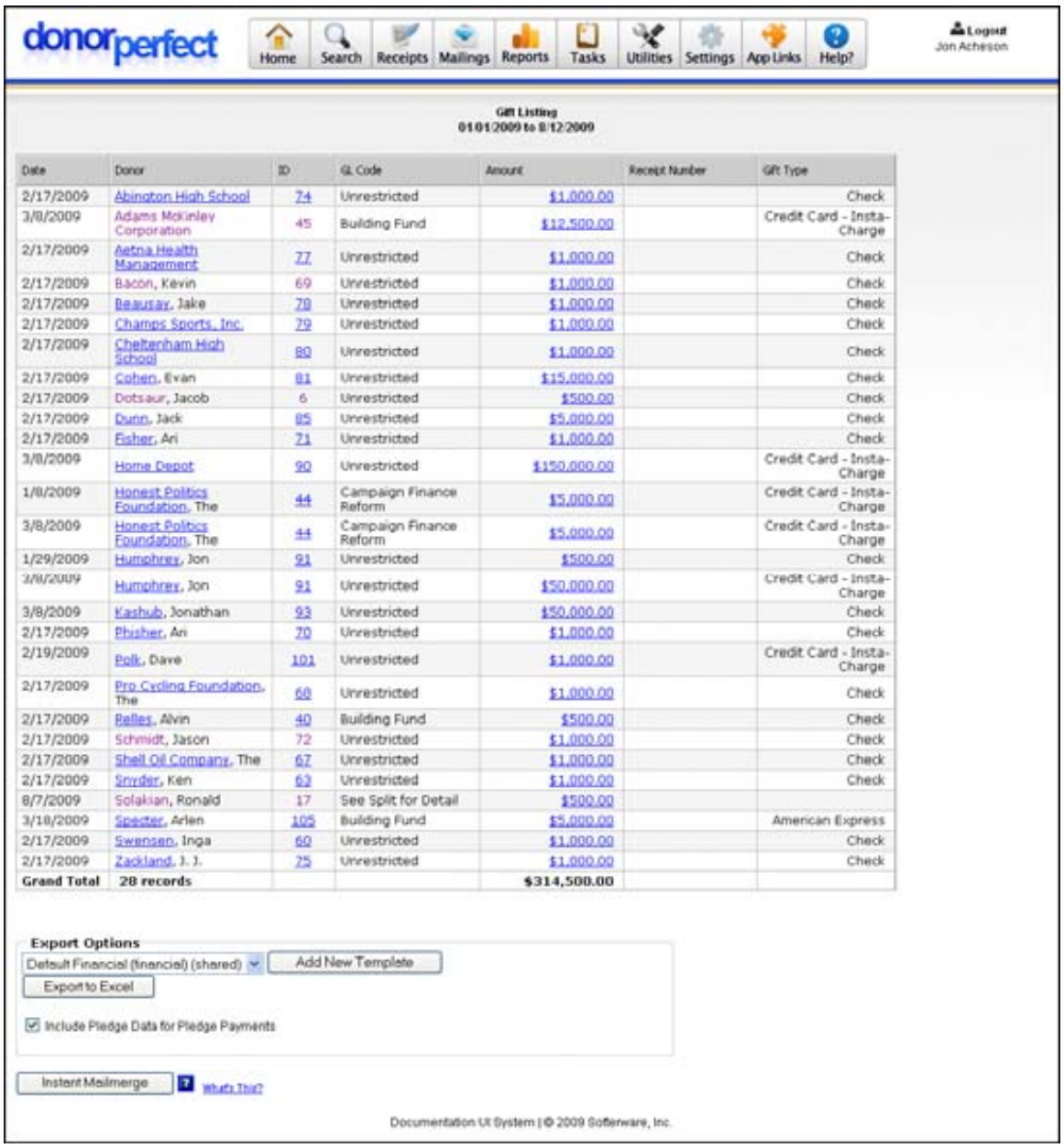
▶ To export the donor records to Microsoft Excel

1. Select the template you want to use for the mail merge from the list under **Export Options**.
2. Click **Export to Excel**.
3. Open the mail merge file in Excel, or save it to disk.

You can also access the Instant Mailmerge feature of DonorPerfect Online from this screen. See "Instant Merge" page 451 for more details on this feature.

Gift Listing Report

The Gift Listing Report is a simple listing of all of the gifts entered into the system within the specified date range.



Date	Donor	ID	GL Code	Amount	Receipt Number	Gift Type
2/17/2009	Abington High School	74	Unrestricted	$1,000.00		Check
3/8/2009	Adams McKinley Corporation	45	Building Fund	$12,500.00		Credit Card - Insta-Charge
2/17/2009	Aetna Health Management	77	Unrestricted	$1,000.00		Check
2/17/2009	Bacon, Kevin	69	Unrestricted	$1,000.00		Check
2/17/2009	Beausay, Jake	70	Unrestricted	$1,000.00		Check
2/17/2009	Champs Sports, Inc.	79	Unrestricted	$1,000.00		Check
2/17/2009	Cheltenham High School	80	Unrestricted	$1,000.00		Check
2/17/2009	Cohen, Evan	81	Unrestricted	$15,000.00		Check
2/17/2009	Dotsaur, Jacob	6	Unrestricted	$500.00		Check
2/17/2009	Dunn, Jack	85	Unrestricted	$5,000.00		Check
2/17/2009	Fisher, Ari	71	Unrestricted	$1,000.00		Check
3/8/2009	Home Depot	90	Unrestricted	$150,000.00		Credit Card - Insta-Charge
1/8/2009	Honest Politics Foundation, The	44	Campaign Finance Reform	$5,000.00		Credit Card - Insta-Charge
3/8/2009	Honest Politics Foundation, The	44	Campaign Finance Reform	$5,000.00		Credit Card - Insta-Charge
1/29/2009	Humphrey, Jon	91	Unrestricted	$500.00		Check
3/8/2009	Humphrey, Jon	91	Unrestricted	$50,000.00		Credit Card - Insta-Charge
3/8/2009	Kashub, Jonathan	93	Unrestricted	$50,000.00		Check
2/17/2009	Phisher, An	70	Unrestricted	$1,000.00		Check
2/19/2009	Polk, Dave	101	Unrestricted	$1,000.00		Credit Card - Insta-Charge
2/17/2009	Pro Cycling Foundation, The	60	Unrestricted	$1,000.00		Check
2/17/2009	Relles, Alvin	40	Building Fund	$500.00		Check
2/17/2009	Schmidt, Jason	72	Unrestricted	$1,000.00		Check
2/17/2009	Shell Oil Company, The	67	Unrestricted	$1,000.00		Check
2/17/2009	Snyder, Ken	63	Unrestricted	$1,000.00		Check
8/7/2009	Solakian, Ronald	17	See Split for Detail	$500.00		
3/18/2009	Spester, Arlen	105	Building Fund	$5,000.00		American Express
2/17/2009	Swensen, Inga	60	Unrestricted	$1,000.00		Check
2/17/2009	Zackland, J. J.	75	Unrestricted	$1,000.00		Check
Grand Total	**28 records**			**$314,500.00**		

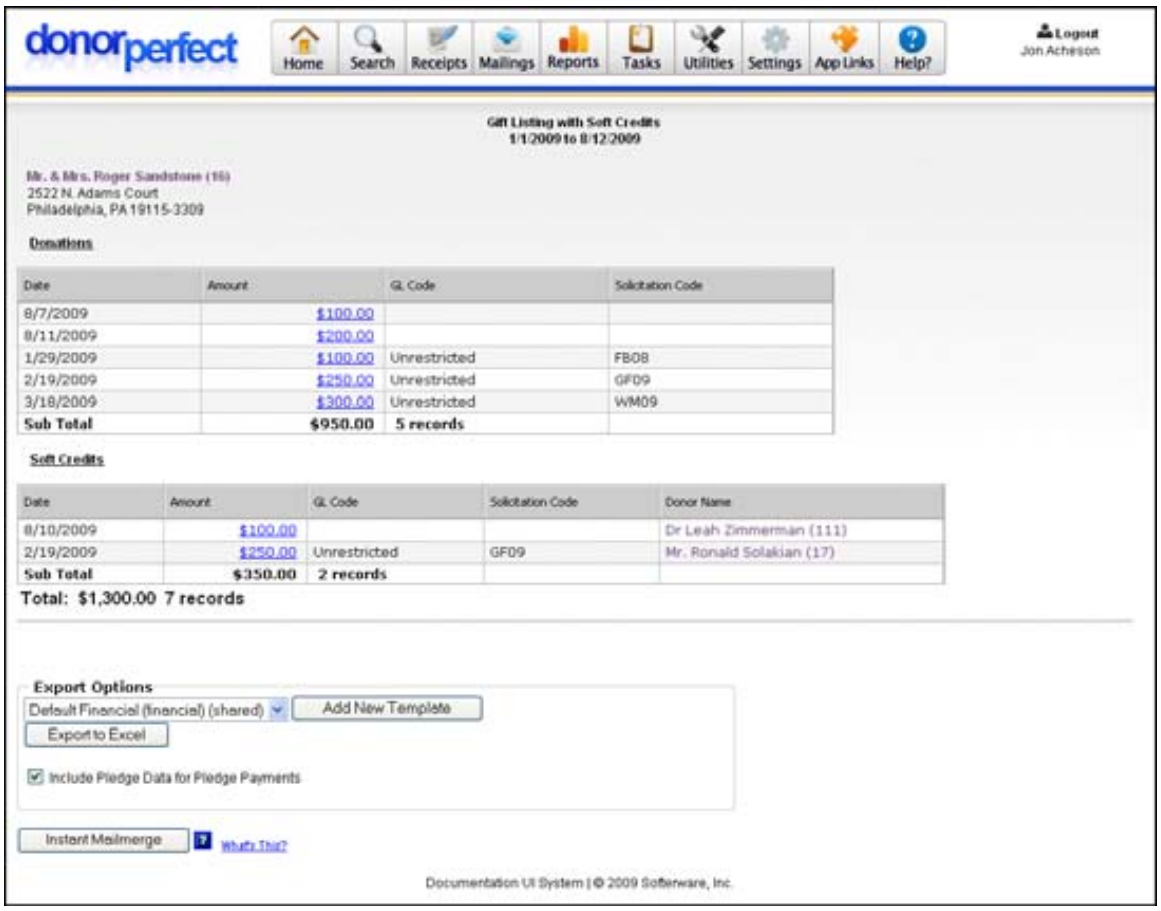
▶ To run the Gift Listing Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Gift Listing** in the **Select a Report** section.
2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.

5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Gift Listing with Linked Soft Credits Report

The Gift Listing with Linked Soft Credits Report lists all gifts and soft credits entered into the system within the specified date range. Gifts and soft credits are sorted by donor.



▶ To run the Gift Listing with Linked Soft Credits Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Gift Listing with Linked Soft Credits** in the **Select a Report** section.
2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

GL Code Analysis Report

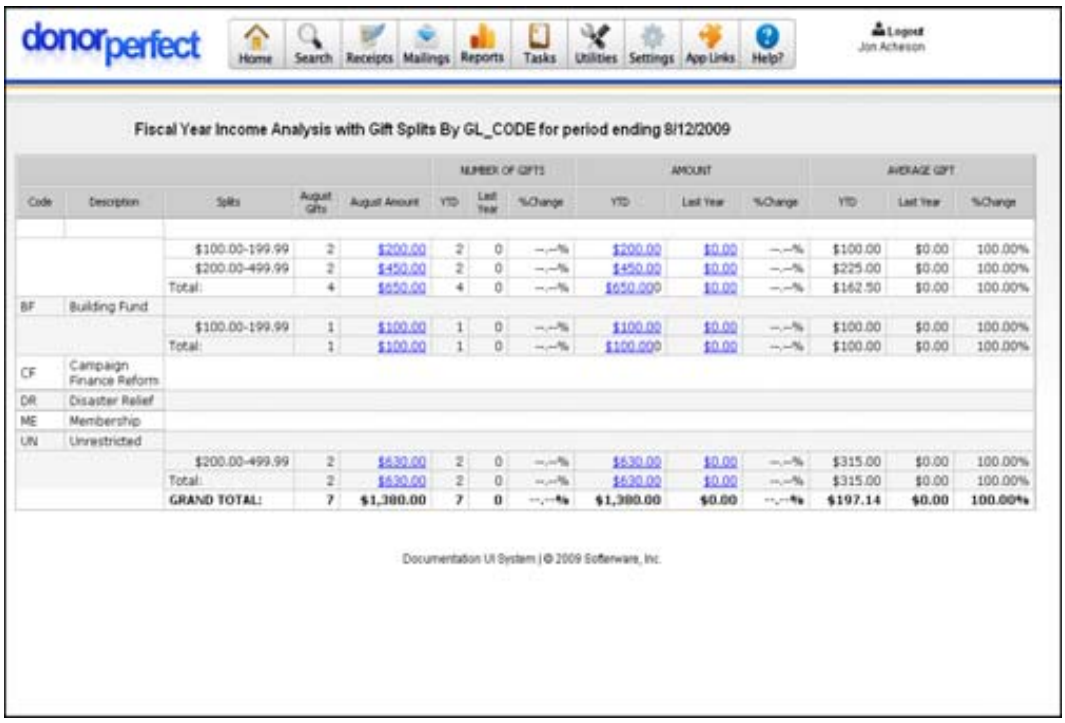
The GL Code Analysis Report breaks down all donations by General Ledger code, and shows donor counts, revenue and percentage of goals, all broken out by GL code.

▶ To run the GL Code Analysis Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Gift Listing** in the **Select a Report** section.
2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Income Analysis with Gift Splits (Fiscal)

The Income Analysis with Gift Splits (Fiscal) Report helps you analyze your organization's income. This flexible report will allow you to choose your own custom gift splits as well as which field (GL Code, Solicit Code, Sub Solicit Code, etc) to segment by.



▶ To view the Income Analysis With Gift Splits (Fiscal) Report

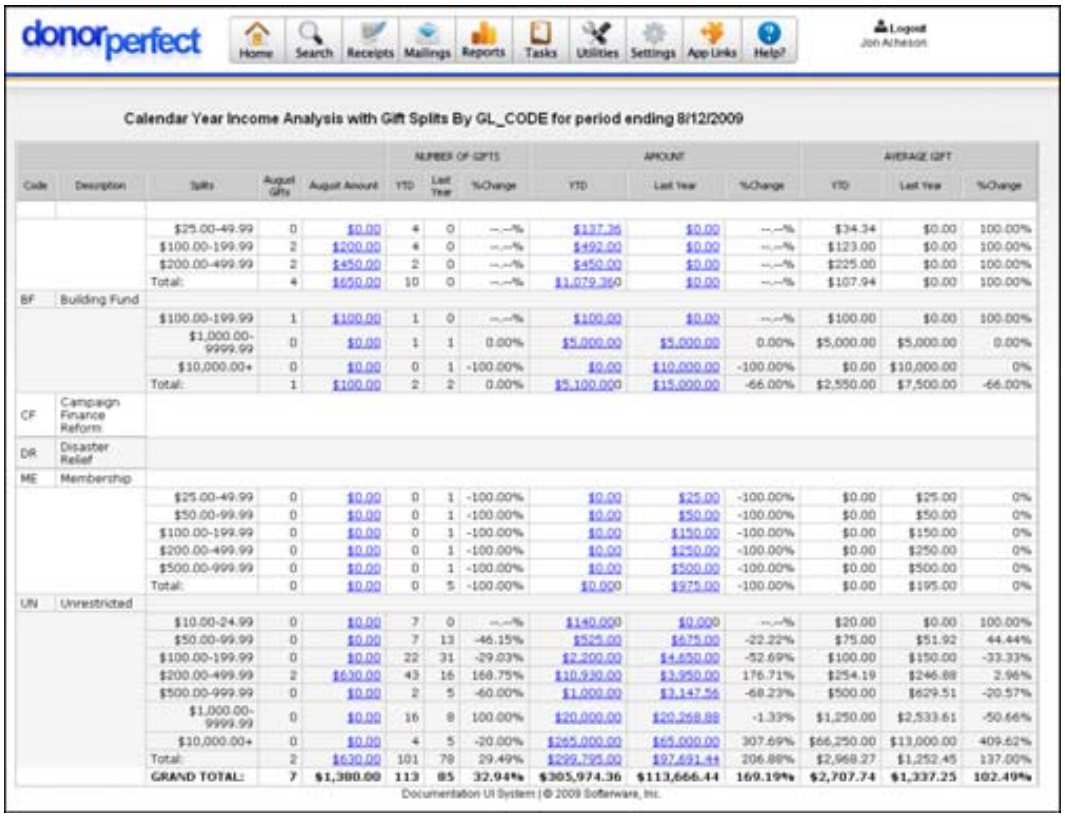
1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Income Analysis With Gift Splits (Fiscal)** in the **Select a Report** section.
2. Enter the **Ending Date** for the report. DonorPerfect will automatically enter today's date. To change it, type in the desired date or click the calendar button.
3. Select the **Field to Segment By**.
4. Fill in your desired gift amount ranges in the boxes that appear.

> Note: The Gift Split boxes allow a user to create a gift range criteria for which donors will be broken down into gift types. These values are completed by default if you set them up in Settings/Parameters/User Settings—see page 391 for details.

5. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the ending date in the title of the report.
7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Income Analysis with Gift Splits (Calendar)

The **Income Analysis** with Gift Splits (Calendar) helps to analyze your organization's income. This flexible report will allow you to choose your own custom gift splits as well as which field (GL Code, Solicit Code, Sub Solicit Code, etc) to segment by.



Code	Description	Splits	August Gifts	August Amount	Number of Gifts YTD	Number of Gifts Last Year	Number of Gifts %Change	Amount YTD	Amount Last Year	Amount %Change	Average Gift YTD	Average Gift Last Year	Average Gift %Change
		$25.00-49.99	0	$0.00	4	0	--.--%	$137.36	$0.00	--.--%	$34.34	$0.00	100.00%
		$100.00-199.99	2	$200.00	4	0	--.--%	$492.00	$0.00	--.--%	$123.00	$0.00	100.00%
		$200.00-499.99	2	$450.00	2	0	--.--%	$450.00	$0.00	--.--%	$225.00	$0.00	100.00%
		Total:	4	$650.00	10	0	--.--%	$1,079.360	$0.00	--.--%	$107.94	$0.00	100.00%
BF	Building Fund												
		$100.00-199.99	1	$100.00	1	0	--.--%	$100.00	$0.00	--.--%	$100.00	$0.00	100.00%
		$1,000.00-9999.99	0	$0.00	1	1	0.00%	$5,000.00	$5,000.00	0.00%	$5,000.00	$5,000.00	0.00%
		$10,000.00+	0	$0.00	0	1	-100.00%	$0.00	$10,000.00	-100.00%	$0.00	$10,000.00	0%
		Total:	1	$100.00	2	2	0.00%	$5,100.000	$15,000.00	-66.00%	$2,550.00	$7,500.00	-66.00%
CF	Campaign Finance Reform												
DR	Disaster Relief												
ME	Membership												
		$25.00-49.99	0	$0.00	0	1	-100.00%	$0.00	$25.00	-100.00%	$0.00	$25.00	0%
		$50.00-99.99	0	$0.00	0	1	-100.00%	$0.00	$50.00	-100.00%	$0.00	$50.00	0%
		$100.00-199.99	0	$0.00	0	1	-100.00%	$0.00	$150.00	-100.00%	$0.00	$150.00	0%
		$200.00-499.99	0	$0.00	0	1	-100.00%	$0.00	$250.00	-100.00%	$0.00	$250.00	0%
		$500.00-999.99	0	$0.00	0	1	-100.00%	$0.00	$500.00	-100.00%	$0.00	$500.00	0%
		Total:	0	$0.00	0	5	-100.00%	$0.000	$975.00	-100.00%	$0.00	$195.00	0%
UN	Unrestricted												
		$10.00-24.99	0	$0.00	7	0	--.--%	$140.000	$0.000	--.--%	$20.00	$0.00	100.00%
		$50.00-99.99	0	$0.00	7	13	-46.15%	$525.00	$675.00	-22.22%	$75.00	$51.92	44.44%
		$100.00-199.99	0	$0.00	22	31	-29.03%	$2,200.00	$4,650.00	-52.69%	$100.00	$150.00	-33.33%
		$200.00-499.99	2	$630.00	43	16	168.75%	$10,930.00	$3,950.00	176.71%	$254.19	$246.88	2.96%
		$500.00-999.99	0	$0.00	2	5	-60.00%	$1,000.00	$3,147.56	-68.23%	$500.00	$629.51	-20.57%
		$1,000.00-9999.99	0	$0.00	16	8	100.00%	$20,000.00	$20,268.88	-1.33%	$1,250.00	$2,533.61	-50.66%
		$10,000.00+	0	$0.00	4	5	-20.00%	$265,000.00	$65,000.00	307.69%	$66,250.00	$13,000.00	409.62%
		Total:	2	$630.00	101	78	29.49%	$299,795.00	$97,691.44	206.88%	$2,968.27	$1,252.45	137.00%
		GRAND TOTAL:	**7**	**$1,380.00**	**113**	**85**	**32.94%**	**$305,974.36**	**$113,666.44**	**169.19%**	**$2,707.74**	**$1,337.25**	**102.49%**

▶ To view the Income Analysis With Gift Splits (Calendar) Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Income Analysis With Gift Splits (Calendar)** in the **Select a Report** section.
2. Enter the **Ending Date**. DonorPerfect will automatically enter today's date. To change it, type in the desired date or click the calendar button.
3. Select the **Field to Segment By**.
4. Fill in your desired gift amount ranges in the boxes that appear.

> Note: The Gift Split boxes allow a user to create a gift range criteria for which donors will be broken down into gift types. These values are completed by default if you set them up in Settings/Parameters/User Settings—see page 391 for details.

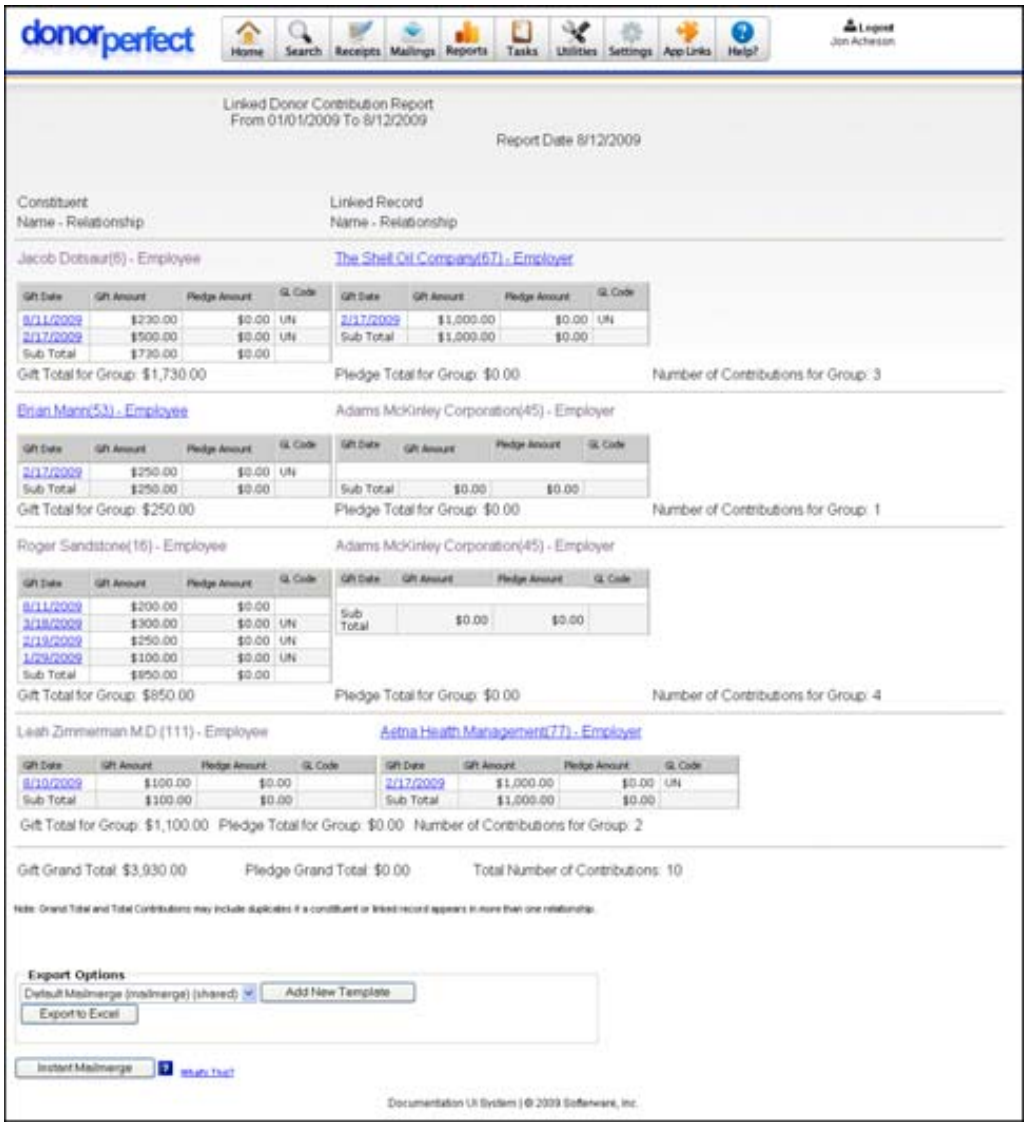
5. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.

6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the ending date in the title of the report.

7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Linked Donor Contribution Report

The Linked Donor Contribution Report allows you to track the donation histories of groups of donors who are joined by some kind of relationship.



▶ To run the Linked Donor Contribution Report

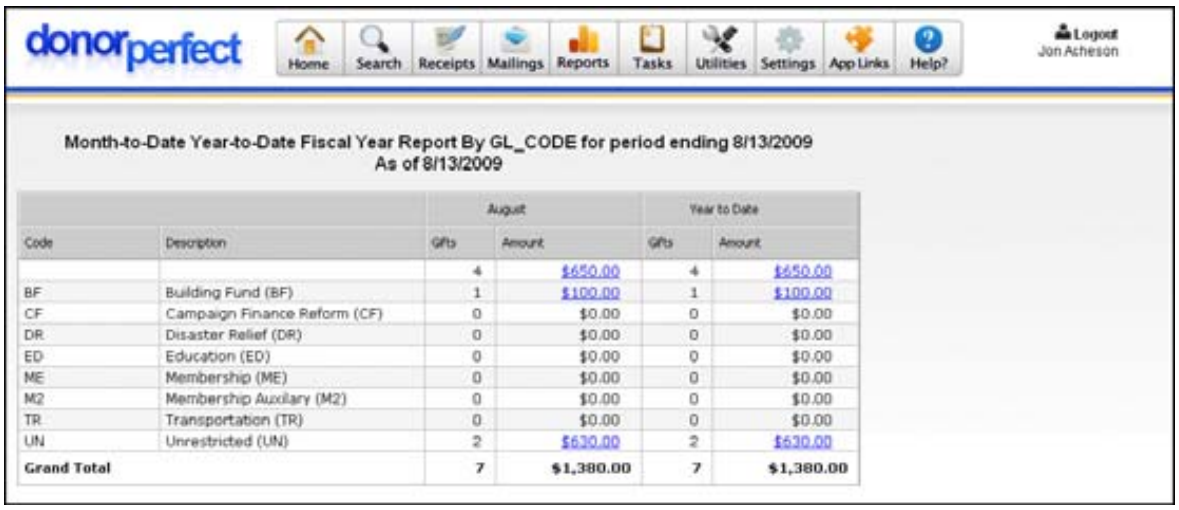
1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Linked Donor Contribution Report** in the **Select a Report** section.

2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default.

3. Select the **Relationship** between the donors. Available options are:
    - Child-to-Parent
    - Employee-to-Employer
    - Employer-to-Employee
    - Foundation-to-Trustee
    - Grandchild-to-Grandparent
    - Grandparent-to-Grandchild
    - Head of Household-to-Member of Household
    - Honorarium Donor-to-Honoree
    - Honoree-to-Honorarium Donor
    - Member of Household-to-Head of Household
    - Memorial Donor-to-Next of Kin
    - Next of Kin-to-Memorial Donor
    - Parent-to-Child
    - Trustee-to-Foundation
4. Select the Printable report format from one of the following options:
    - **Multiple donors per page** – When the report is printed out, more than one donor will appear on each page, if space allows.
    - **One donor per page** – Each donor is printed out on a separate page.
- Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear just below the date range in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

MTD/FYTD Summary (Fiscal) Report

The Month-to-Date and Year-to-Date (Fiscal) Report shows the total gift counts and amounts for the month-to-date and year-to-date based on the fiscal year and the end date selected when you run it.



▶ To view the MTD/YTD Summary (Fiscal) Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **MTD/FYTD Summary (Fiscal)** in the **Select a Report** section.
2. Enter the **Ending Date** for the report. DonorPerfect will automatically enter today's date. To change it, type in the desired date or click the calendar button.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Select **Field to Segment By**.
5. Check **Remove Total to Date** to remove the **Total to Date** column from the report. If this box is not checked, the **Total to Date** column will list a running total for each category of gifts and amounts running back to the beginning of the data in the system.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the ending date in the title of the report.
7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

MTD/CYTD Summary (Calendar) Report

The **Month-to-Date and Year-to-Date (Calendar)** shows the total gift counts and amounts for the month-to-date and year-to-date based on the calendar year and the end date selected at runtime.

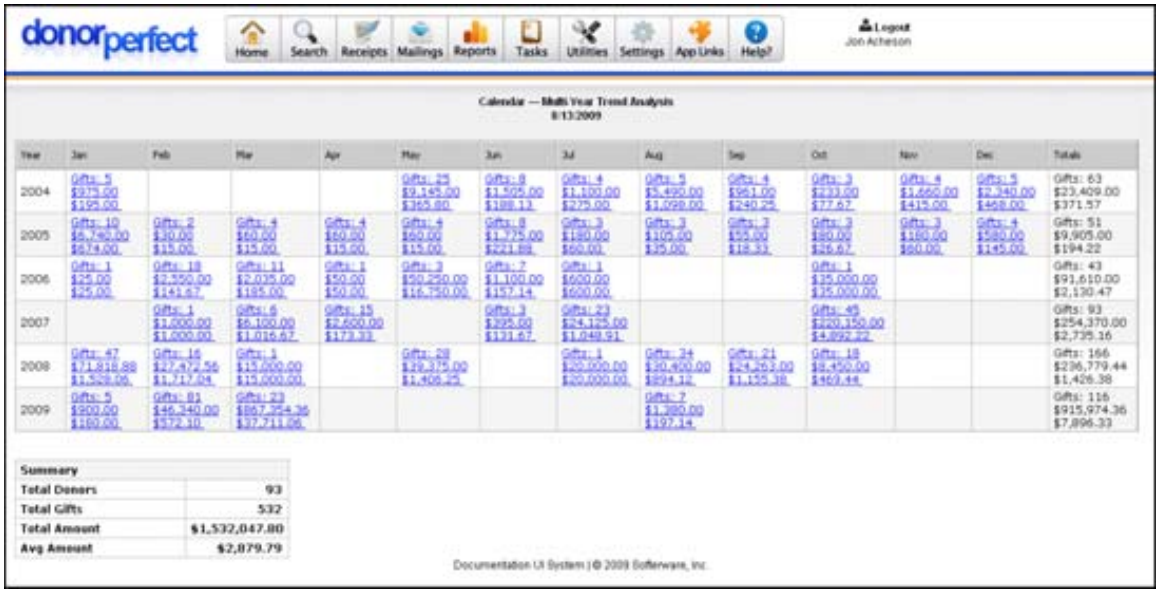
		August		Year to Date	
Code	Description	Gifts	Amount	Gifts	Amount
		4	$650.00	10	$1,079.36
BF	Building Fund (BF)	1	$100.00	5	$615,100.00
CF	Campaign Finance Reform (CF)	0	$0.00	0	$0.00
DR	Disaster Relief (DR)	0	$0.00	0	$0.00
ED	Education (ED)	0	$0.00	0	$0.00
ME	Membership (ME)	0	$0.00	0	$0.00
M2	Membership Auxiliary (M2)	0	$0.00	0	$0.00
TR	Transportation (TR)	0	$0.00	0	$0.00
UN	Unrestricted (UN)	2	$630.00	101	$299,795.00
Grand Total		**7**	**$1,380.00**	**116**	**$915,974.36**

▶ To view the MTD/YDT Summary (Calendar) Report

1. From the Financial Reports screen, choose General Reports in the Select a Category section, and then select MTD/CYTD Summary (Calendar) in the Select a Report section.
2. Enter the **Ending Date** for the report. DonorPerfect will automatically enter today's date. To change it, type in the desired date or click the calendar button.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Select **Field to Segment By**.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the ending date in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Multi-Year Trend Analysis Report

The **Multi-Year Trend Analysis Report** provides gift information for each month of the selected year range. For each month, the number of gifts, total amount of the gifts, and average gift amount is listed. The summary of the report contains a count of Total Donors, Total Gifts, Total Amount, and Average Gift Amount.



▶ To view the Multi-Year Trend Analysis Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Multi Year Trend Analysis** in the **Select a Report** section.
2. Enter the **Number of Years** you want to include in the report.
3. Select **Calendar** or **Fiscal**.
4. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Periodic Gift Comparison Report

The Periodic Gift Comparison report allows you to examine the flow of donations over a period of time. Donations are separated out according to the value in a field, such as GL Code, and are also split up into regular time periods, such as weeks, months, or quarters.

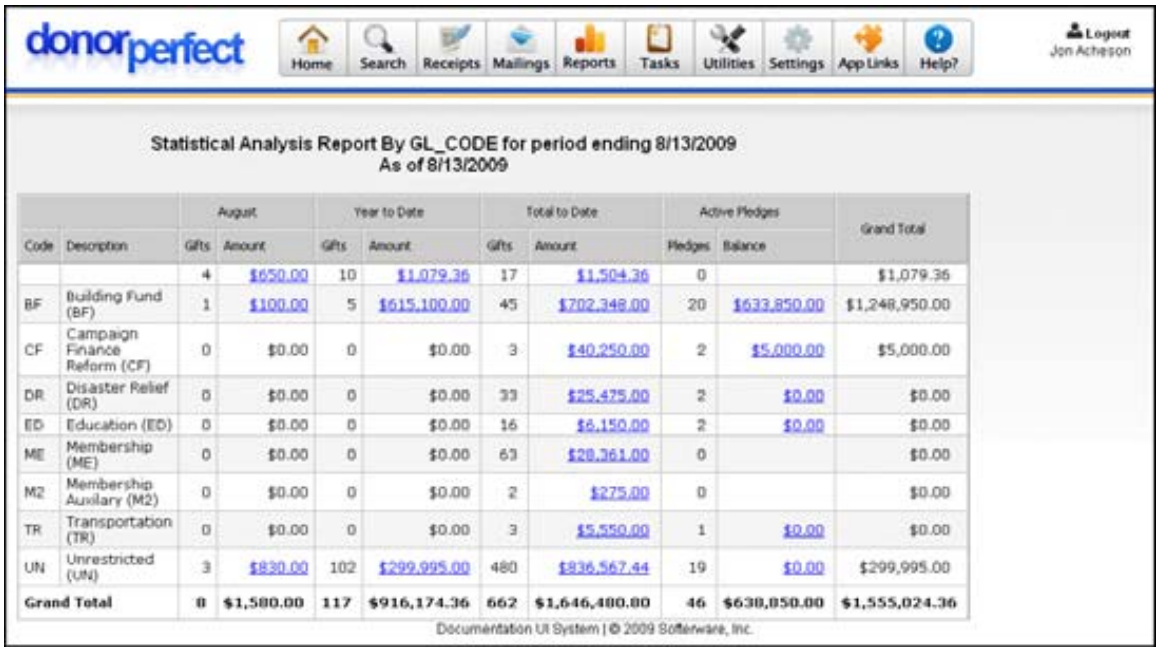
GL CODE by QUARTER
From 1/1/2009 to 9/30/2009

GL CODE	Count	Sum	Count	Sum	Count	Sum	Count	Sum
	1/1/2009 - 3/31/2009		4/1/2009 - 6/30/2009		7/1/2009 - 9/30/2009		Total	
	6	$429.36	2	$500.00	3	$450.00	11	$1,379.36
Building Fund	4	$615,000.00	0	$0.00	2	$300.00	6	$615,300.00
Membership	4	$1,150.00	1	$300.00	0	$0.00	5	$1,450.00
Scholarship	1	$50.00	1	$400.00	1	$200.00	3	$650.00
Unrestricted	96	$298,515.00	0	$0.00	7	$51,230.00	103	$349,745.00
Disaster Relief	0	$0.00	1	$50.00	0	$0.00	1	$50.00
Campaign Finance Reform	0	$0.00	0	$0.00	2	$3,000.00	2	$3,000.00
Education	0	$0.00	0	$0.00	3	$800.00	3	$800.00
Transportation	0	$0.00	0	$0.00	1	$400.00	1	$400.00
Total	**111**	**$915,144.36**	**5**	**$1,250.00**	**19**	**$56,380.00**	**135**	**$972,774.36**

▶ To run the Periodic Gift Comparison Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Periodic Gift Comparison** in the **Select a Report** section.
2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default.
3. Select the time period to divide the date range up into (ex: **Months**) from the **Split by** list.
4. Select the **Field to segment by**. This field will be used to split up the gift entries into categories along the left side of the report. For instance, you could segment the gift entries by GL Code.
5. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Statistical Analysis Report



Statistical Analysis Report By GL_CODE for period ending 8/13/2009
As of 8/13/2009

		August		Year to Date		Total to Date		Active Pledges		Grand Total
Code	Description	Gifts	Amount	Gifts	Amount	Gifts	Amount	Pledges	Balance	
		4	$650.00	10	$1,079.36	17	$1,504.36	0		$1,079.36
BF	Building Fund (BF)	1	$100.00	5	$615,100.00	45	$702,348.00	20	$633,850.00	$1,248,950.00
CF	Campaign Finance Reform (CF)	0	$0.00	0	$0.00	3	$40,250.00	2	$5,000.00	$5,000.00
DR	Disaster Relief (DR)	0	$0.00	0	$0.00	33	$25,475.00	2	$0.00	$0.00
ED	Education (ED)	0	$0.00	0	$0.00	16	$6,150.00	2	$0.00	$0.00
ME	Membership (ME)	0	$0.00	0	$0.00	63	$28,361.00	0		$0.00
M2	Membership Auxilary (M2)	0	$0.00	0	$0.00	2	$275.00	0		$0.00
TR	Transportation (TR)	0	$0.00	0	$0.00	3	$5,550.00	1	$0.00	$0.00
UN	Unrestricted (UN)	3	$830.00	102	$299,995.00	480	$836,567.44	19	$0.00	$299,995.00
Grand Total		**8**	**$1,580.00**	**117**	**$916,174.36**	**662**	**$1,646,480.80**	**46**	**$638,850.00**	**$1,555,024.36**

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

▶ To run the Statistical Analysis Report

1. From the **Financial Reports** screen, choose **Direct Mail Reports** in the **Select a Category** section, and then select **Statistical Analysis** in the **Select a Report** section.
2. Enter the **Ending Date** for the report. Today's date is entered by default.
3. Set **Field to segment by** to the field that you will use to categorize your gifts and pledges. For instance, if you choose **GL Code**, each General Ledger code would have a separate line in the report listing the totals associated with it.
4. Check **Remove Total to Date** to remove the **Total to Date** column from the report. If this box is not checked, the **Total to Date** column will list a running total for each category of gifts and pledges running back to the beginning of the data in the system.
5. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the ending date in the title of the report.
7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Statistical Tabulation Report

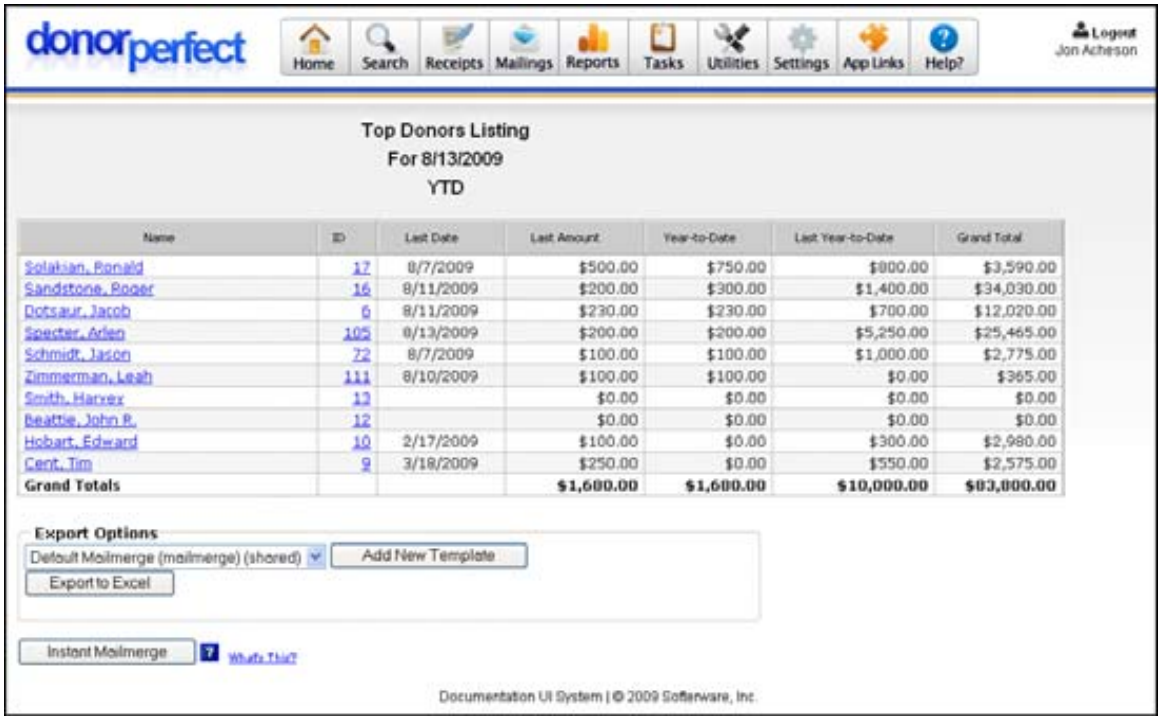
The **Statistical Tabulation Report** shows the total amount and total count of money raised with grouping by segment.

▶ To view the Statistical Tabulation Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Statistical Tabulation** in the **Select a Report** section.
2. Enter the **Date Range** for the report.
3. Select the **Field to segment by**. This field will be used to split up the gift entries into categories along the left side of the report. For instance, you could segment the gift entries by GL Code.
4. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Top Donor Listing Report

The **Top Donor Listing Report** lists top donors based on any calculated gift field. A user can choose to run for x number or x percent of donors (e.g., Top 10 Donors, Top 10% of Donors, etc.).



▶ To view the Top Donor Listing Report

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **Top Donor Listing** in the **Select a Report** section.
2. Enter the **Field to use in report**.
3. Enter a number in the **Show the top** field.
4. Choose **Count** or **Percent**.
5. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

UK Gift Aid Reports

UK Gift Aid Schedule Up To 4/5/08

UK Gift Aid Schedule From 4/6/08

The UK Gift Aid reports are intended to be submitted to HM Revenue and Customs (HMRC) as an R68 Gift Aid Schedule form. There are two versions of this report:

- **UK Gift Aid Report (up to 5/4/2008)** – This report matches the older format of the R68 Gift Aid Schedule form that was used up to April 5, 2008.
- **UK Gift Aid Report (from 6/4/2008)** – This report matches the current R68 Gift Aid Schedule form used from April 6, 2008 to the present.

These forms replace the older R68 Inland Revenue Report.

Enabling the UK Gift Aid Reports

The UK Gift Aid reports do not appear in the Financial Reports screen unless they are first enabled in the Parameters screen.

▶ To enable the UK Gift Aid reports

1. From the navigation bar, select **Settings**, then **Parameters**.
2. In the Parameters screen, click on the **Acknowledgements/Receipts, Financial Reports** link.
3. In the Financial Reports/Receipt Processing screen, check the **Gift AID R68 Report (UK Clients Only)** option.
4. Enter your HMRC Charities reference number in the **Reference** field.
5. Click the **Save** button to save the changes to the parameters.

Marking Gifts as Eligible for UK Gift Aid Reports

In order for gifts to show up in the UK Gift Aid reports, they must first be marked as eligible to appear in the reports. This can be done in one of two ways:

- In the Gift Entry screen for each gift, check the **Gift Aid Eligible** option. This will mark that gift as eligible to appear in the reports.
- In the Main Entry Screen, in the Constituent Contact Information section, check the **Gift Aid Eligible** option. While this option is checked, all gifts entered for the constituent are automatically marked as eligible to appear in the reports.

Once gifts are marked **Gift Aid Eligible**, they will appear in the UK Gift Aid reports.

Running the UK Gift Aid Reports

▶ To run the UK Gift Aid Report (up to 5/4/2008)

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **UK Gift Aid Report (up to 5/4/2008)** in the **Select a Report** section.
2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default. The ending date cannot be later than April 5, 2008.
3. Set the **Accounting Date** to **4/5/2008**.
4. Check **Update selected gifts** to mark the gifts listed in the report as having been processed. Gifts marked as processed will not appear in the report the next time it is run, unless you check **Include already processed gifts**.
5. Check **Include already processed gifts** to include gifts that are already marked as having been processed in the report.
6. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

▶ To run the UK Gift Aid Report (from 6/4/2008)

1. From the Financial Reports screen, choose **General Reports** in the **Select a Category** section, and then select **UK Gift Aid Report (from 6/4/2008)** in the **Select a Report** section.
2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default. The starting date cannot be earlier than April 6, 2008.
3. Enter the end of your accounting period in the **Accounting Date** field.
4. Check **Update selected gifts** to mark the gifts listed in the report as having been processed. Gifts marked as processed will not appear in the report the next time it is run, unless you check **Include already processed gifts**.

5. Check **Include already processed gifts** to include gifts that are already marked as having been processed in the report.
6. Select the time period to divide the date range up into (ex: **Months**) from the **Split by** list.
7. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
8. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Pledge Reports

The following reports are available in the Pledge Reports category:

- Actual Cash Flow Projection Report
- Cash Flow Projection Report
- Balance Dues
- Delinquents
- Journal
- Linked Gifts
- Listing
- Status

Actual Cash Flow Projection Report

The **Actual Cash Flow Projection Report** lists a monthly summary of the pledge payments that were actually received during the date range you selected. The projected totals based on the pledge payment schedules are also listed for each month.

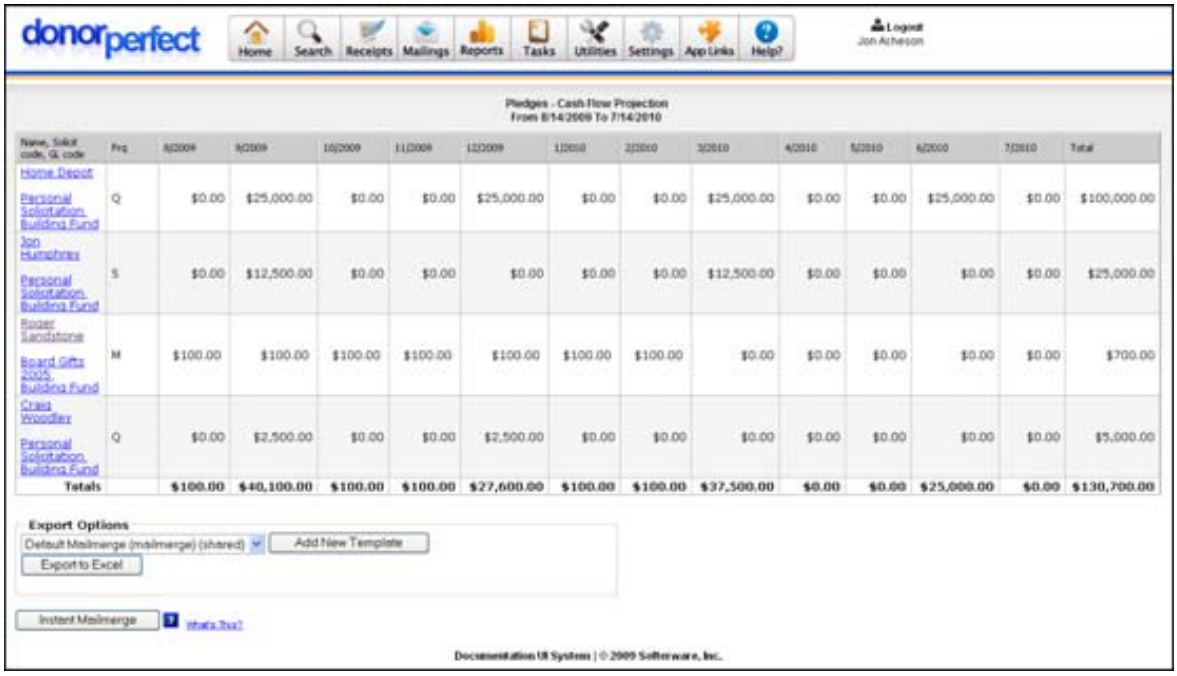
▶ To view the Actual Cash Flow Projection Report

1. From the Financial Reports screen, choose **Pledge Reports** in the **Select a Category** section, and then select **Actual Cash Flow Projection** in the **Select a Report** section.

2. Specify the desired **Date Range**.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Cash Flow Projection Report

The Cash Flow Projection Report lists each pledge that will bring income during the date range you select.

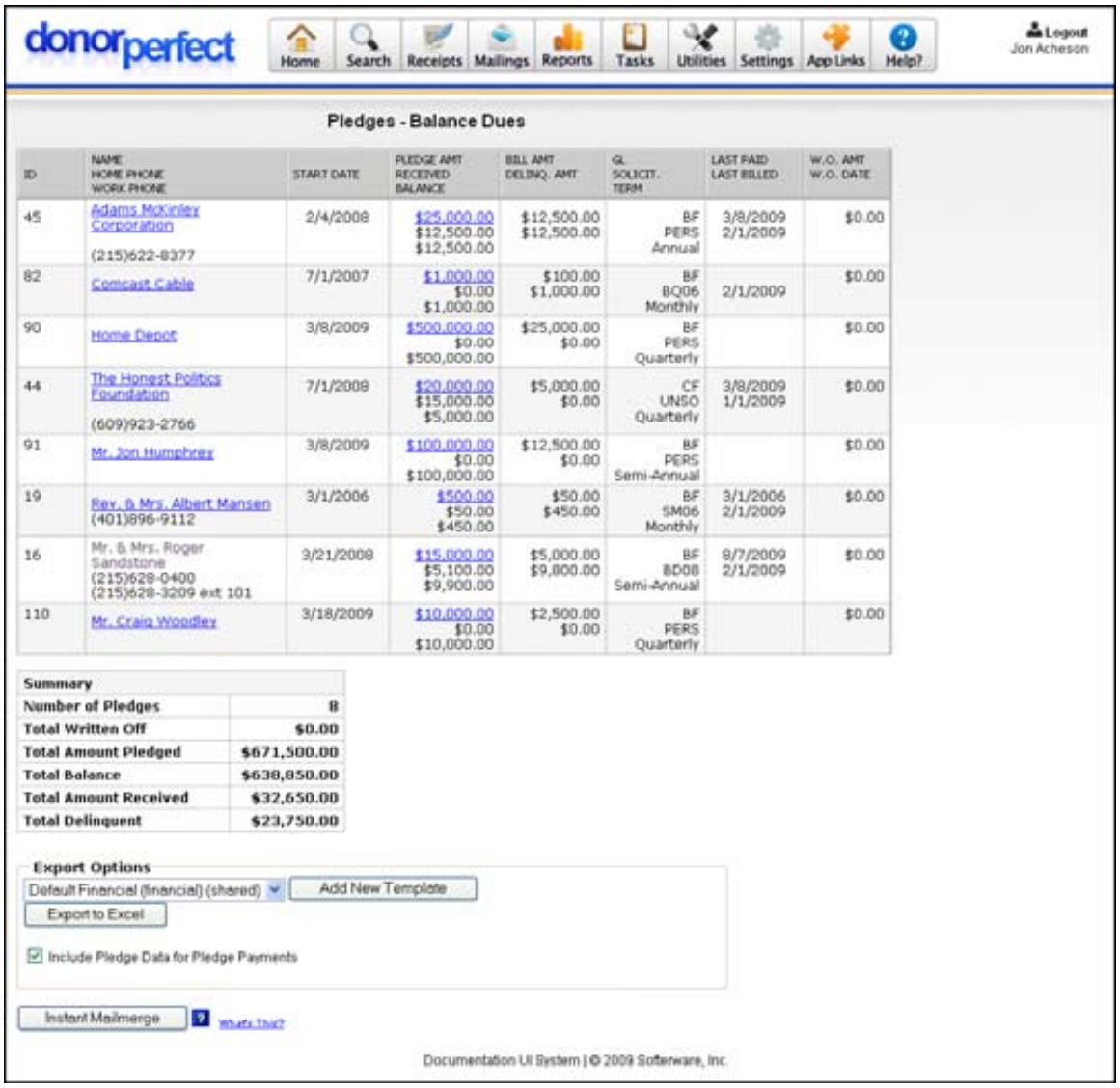


▶ To view the Cash Flow Projection Report

1. From the Financial Reports screen, choose **Pledge Reports** in the **Select a Category** section, and then select **Cash Flow Projection** in the **Select a Report** section.
2. Specify the desired **Date Range**.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Balance Dues Report

The **Balance Dues Report** provides detailed information on all pledges still owing balances.

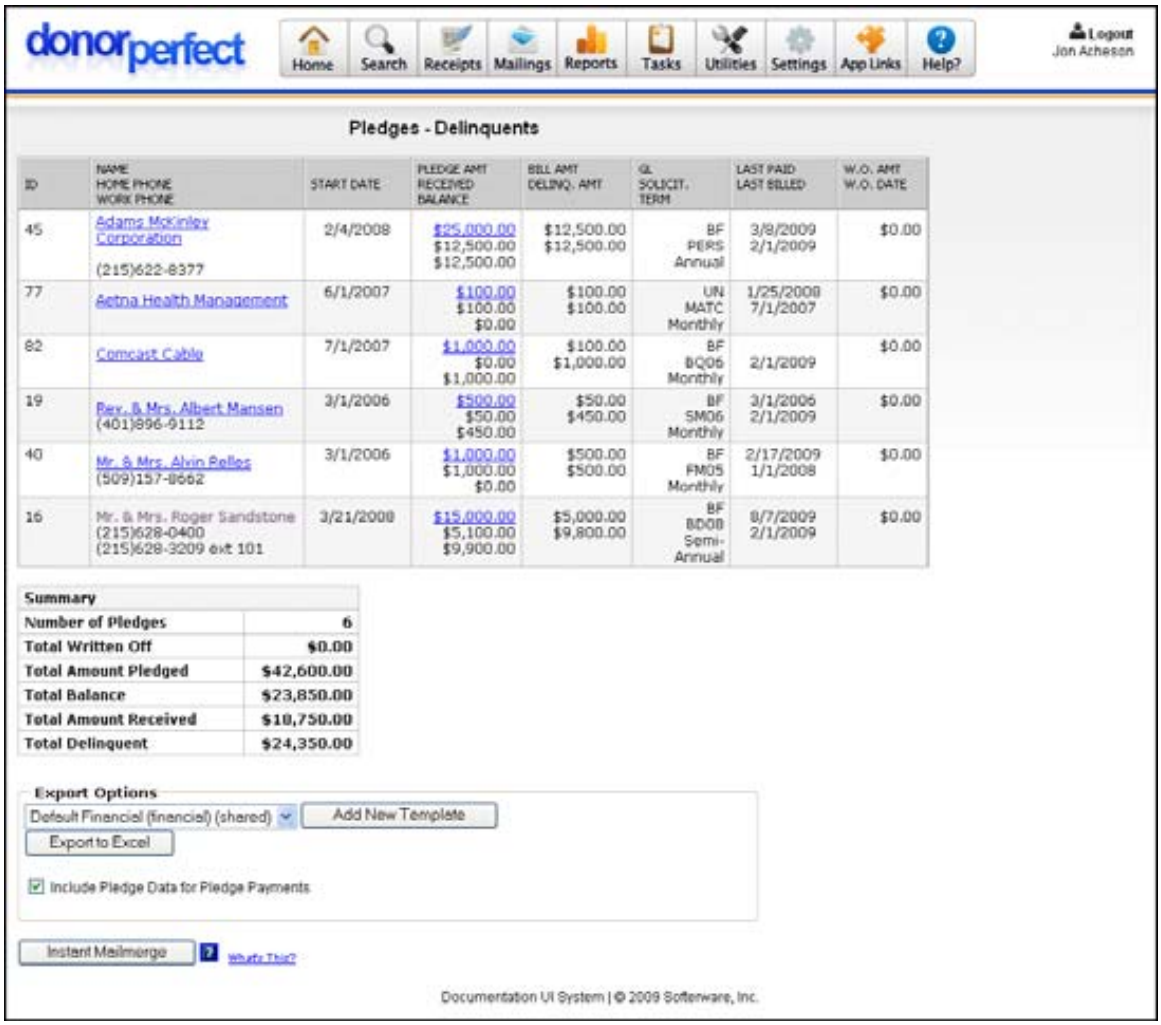


▶ To view the Balance Dues Report

1. From the Financial Reports screen, choose **Pledge Reports** in the **Select a Category** section, and then select **Balance Dues** in the **Select a Report** section.
2. In **Sort by**, choose **Name** or **Date**.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the name or date in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Delinquents Report

The **Delinquents Report** provides detailed information on all delinquent pledges. Delinquent amounts are only accurate if pledge reminders have been run on a monthly basis. For details, see "Pledge Reminders" on page 302.

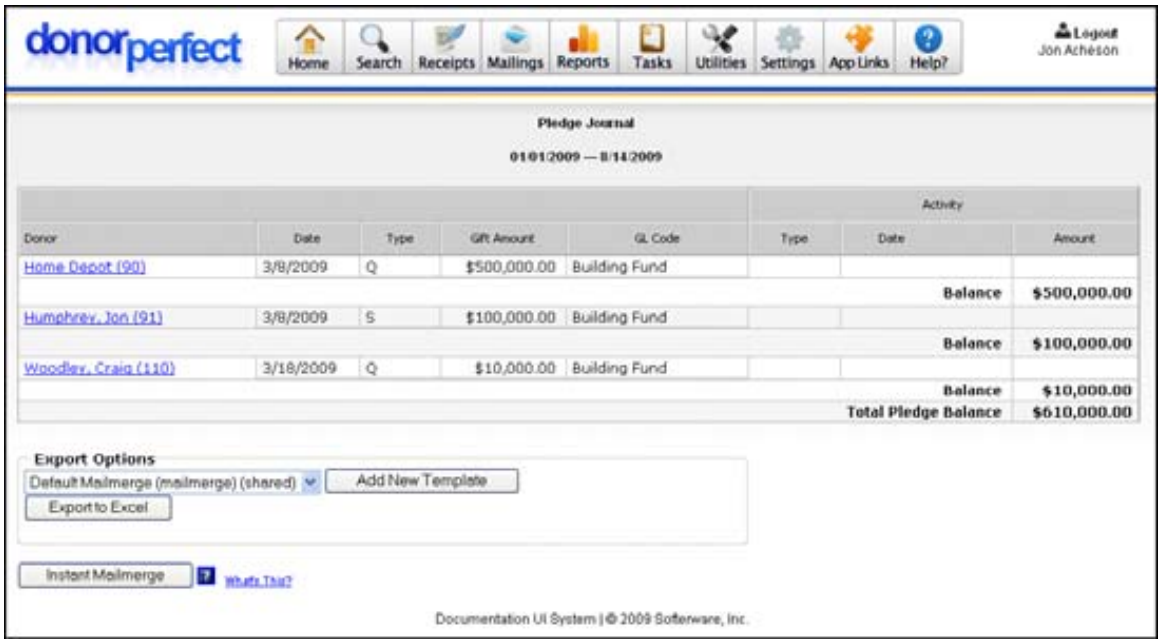


▶ To view the Delinquents Report

1. From the **Financial Reports** screen, choose **Pledge Reports** in the **Select a Category** section, and then select **Delinquents** in the **Select a Report** section.
2. In **Sort by**, choose **Name** or **Date**.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the name or date in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Journal Report

The Pledge Journal report shows a listing of all pledges made during a specified time period, along with their associated payments.

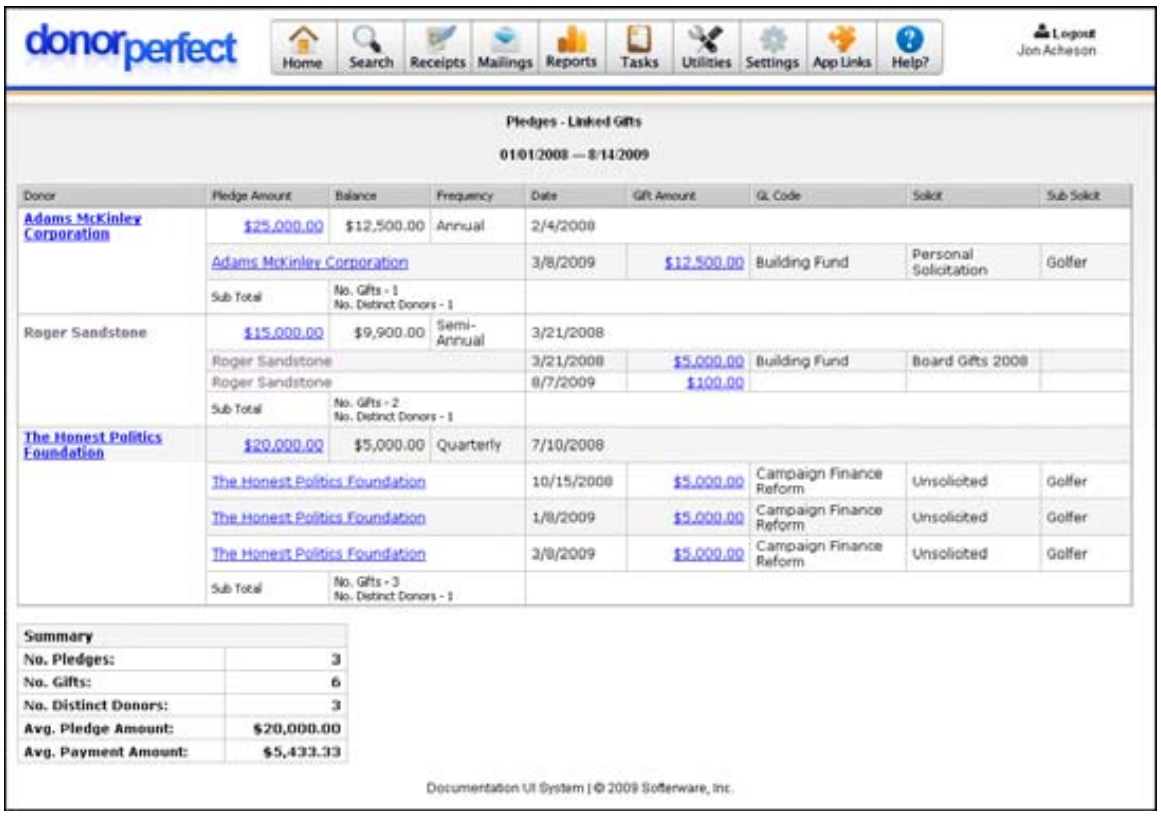


▶ To run the Pledge Journal Report

1. From the Financial Reports screen, choose **Pledge Reports** in the **Select a Category** section, and then select **Journal** in the **Select a Report** section.
2. Enter the starting and ending dates in the **Date Range**. The beginning of the current year and today's date are filled in for you by default.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear just below the date range in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Linked Gifts

The **Linked Gifts Report** shows you all gifts that are linked to a pledge. It shows how much money the donor pledged and details on gifts applied to the pledge, including the date, amount, GL code, and solicitation code.

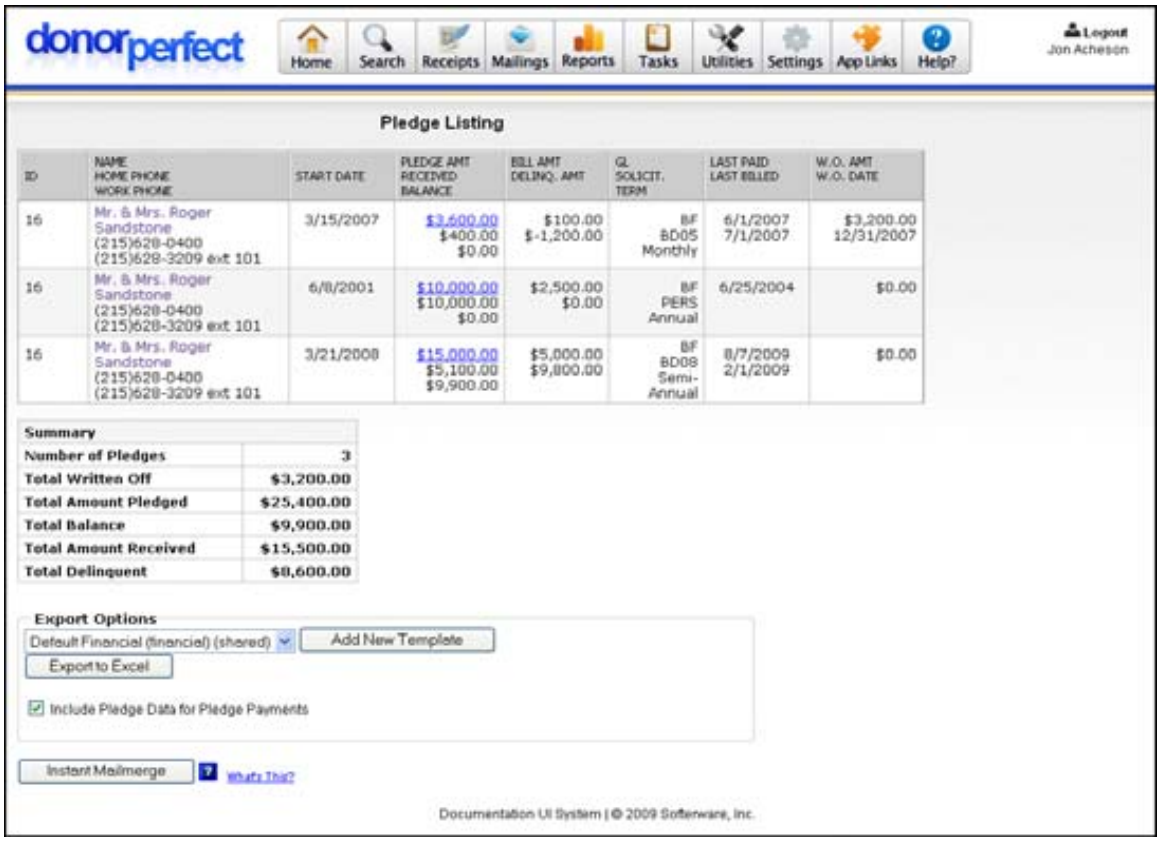


▶ To view the Linked Gifts Report

1. From the **Financial Reports** screen, choose **Pledge Reports** in the **Select a Category** section, and then select **Linked Gifts** in the **Select a Report** section.
2. Specify the desired **Date Range**.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Pledge Listing Report

The Listing Report provides detailed information on all pledges within the system that have outstanding balances.

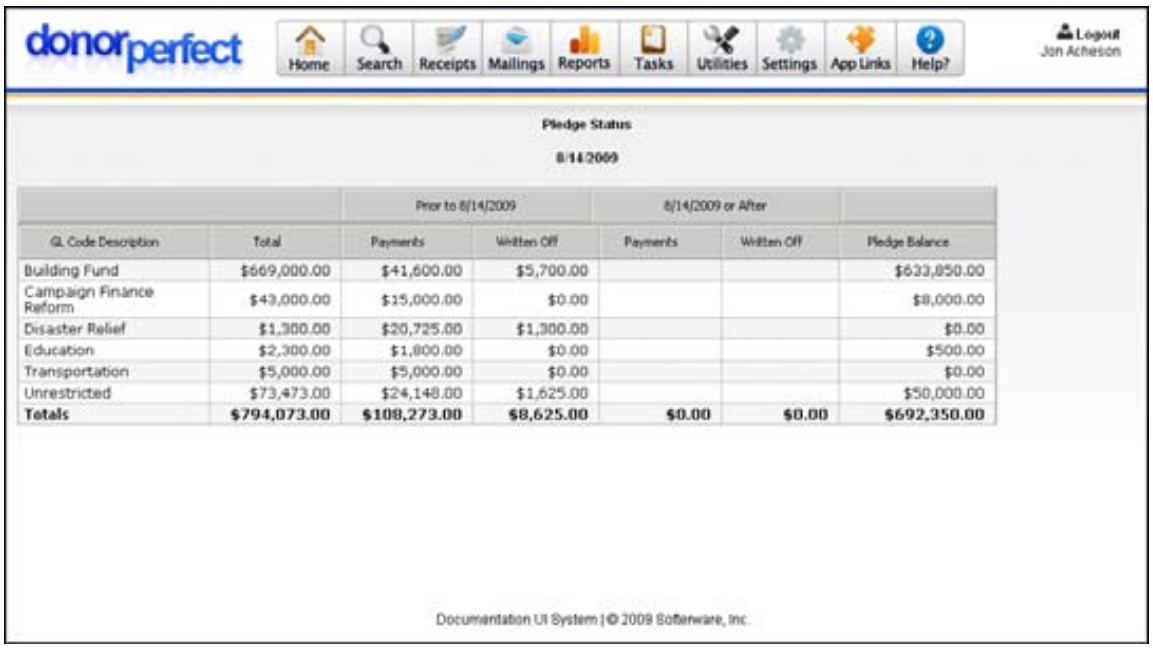


▶ To view the Pledge Listing Report

1. From the **Financial Reports** screen, choose **Pledge Reports** in the **Select a Category** section, and then select **Listing** in the **Select a Report** section.
2. In **Sort by**, choose **Name** or **Date**.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the name or date in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Pledge Status Report

The Pledge Status Report provides a breakdown of all open pledges by General Ledger code.



▶ To run the Pledge Status Report

1. From the **Financial Reports** screen, choose **Pledge Reports** in the **Select a Category** section, and then select **Status Report** in the **Select a Report** section.
2. Specify the **Ending Date** for the report. The report will divide the pledge listings into "before this date," and "after this date." Today's date is entered for you by default.
3. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the ending date in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

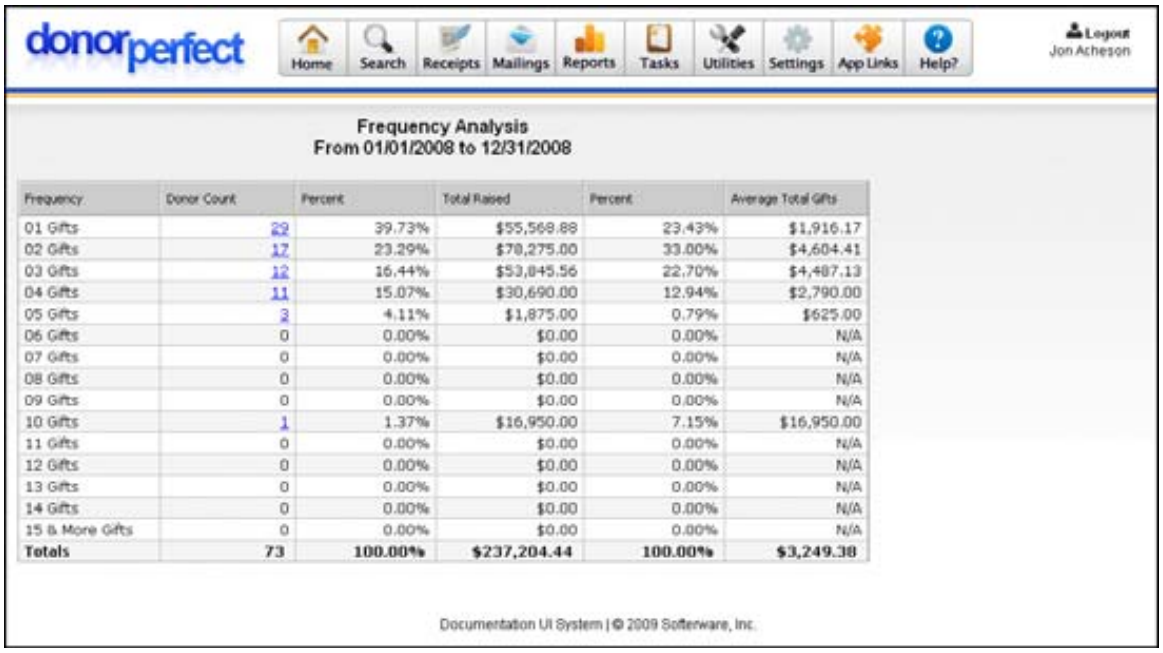
Direct Mail Reports

The following reports are available in the Direct Mail Reports category:

- Frequency Analysis
- Gift Range Report
- LYBNTY
- Recency by Frequency
- Recency Report
- Solicitation Analysis
- Statistical Analysis
- Sub-Solicitation Analysis
- SYBNTY

Frequency Analysis Report

The **Frequency Analysis Report** illustrates the frequency of the donor's gifts. In this report, you can view how many donors and what percentage of donors gave a certain number of gifts. You can also view the total amount of money raised for each category and the average amount of each gift for each category.



Frequency	Donor Count	Percent	Total Raised	Percent	Average Total Gifts
01 Gifts	29	39.73%	$55,568.88	23.43%	$1,916.17
02 Gifts	17	23.29%	$78,275.00	33.00%	$4,604.41
03 Gifts	12	16.44%	$53,845.56	22.70%	$4,487.13
04 Gifts	11	15.07%	$30,690.00	12.94%	$2,790.00
05 Gifts	3	4.11%	$1,875.00	0.79%	$625.00
06 Gifts	0	0.00%	$0.00	0.00%	N/A
07 Gifts	0	0.00%	$0.00	0.00%	N/A
08 Gifts	0	0.00%	$0.00	0.00%	N/A
09 Gifts	0	0.00%	$0.00	0.00%	N/A
10 Gifts	1	1.37%	$16,950.00	7.15%	$16,950.00
11 Gifts	0	0.00%	$0.00	0.00%	N/A
12 Gifts	0	0.00%	$0.00	0.00%	N/A
13 Gifts	0	0.00%	$0.00	0.00%	N/A
14 Gifts	0	0.00%	$0.00	0.00%	N/A
15 & More Gifts	0	0.00%	$0.00	0.00%	N/A
Totals	**73**	**100.00%**	**$237,204.44**	**100.00%**	**$3,249.38**

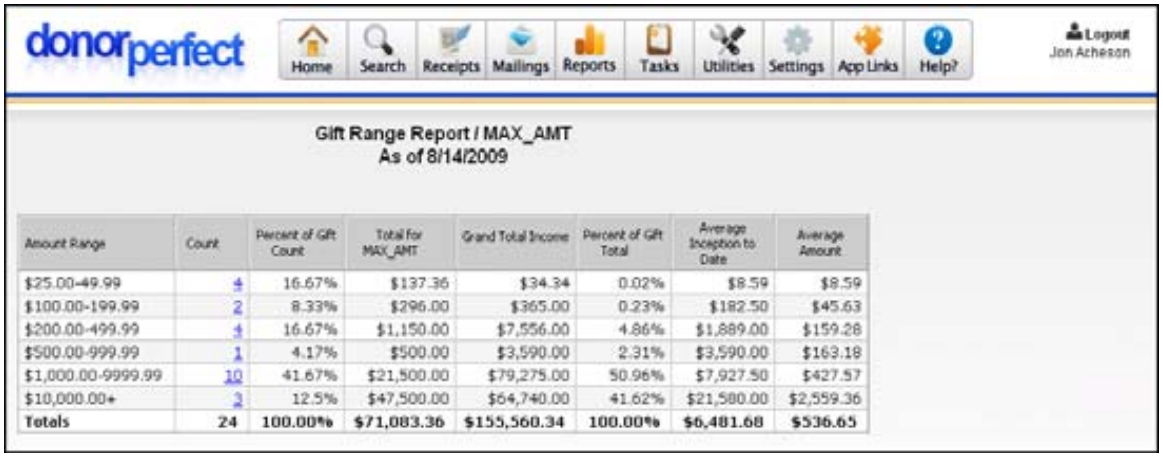
▶ To view the Frequency Analysis Report

1. From the Financial Reports screen, choose **Direct Mail Reports** in the **Select a Category** section, and then select **Frequency Analysis** in the **Select a Report** section.

2. Enter the **Date Range** for the report.
3. Set **Up to _____ Gifts** to the upper limit on the number of gifts that will be displayed on the report. The last line of the report will read **X & More Gifts**, where **X** is the number specified.
4. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Gift Range Report

The **Gift Range Report** provides gift amount ranges with the number of donations within each range. The report also shows the percentage of gifts within each range, the total amount of income for each range, the percentage of income, the average inception to date of the gifts within each range, and the average amount of the gifts within each range.



Gift Range Report / MAX_AMT
As of 8/14/2009

Amount Range	Count	Percent of Gift Count	Total for MAX_AMT	Grand Total Income	Percent of Gift Total	Average Inception to Date	Average Amount
$25.00-49.99	4	16.67%	$137.36	$34.34	0.02%	$8.59	$8.59
$100.00-199.99	2	8.33%	$296.00	$365.00	0.23%	$182.50	$45.63
$200.00-499.99	4	16.67%	$1,150.00	$7,556.00	4.86%	$1,889.00	$159.28
$500.00-999.99	1	4.17%	$500.00	$3,590.00	2.31%	$3,590.00	$163.18
$1,000.00-9999.99	10	41.67%	$21,500.00	$79,275.00	50.96%	$7,927.50	$427.57
$10,000.00+	3	12.5%	$47,500.00	$64,740.00	41.62%	$21,580.00	$2,559.36
Totals	**24**	**100.00%**	**$71,083.36**	**$155,560.34**	**100.00%**	**$6,481.68**	**$536.65**

▶ To view the Gift Range Report

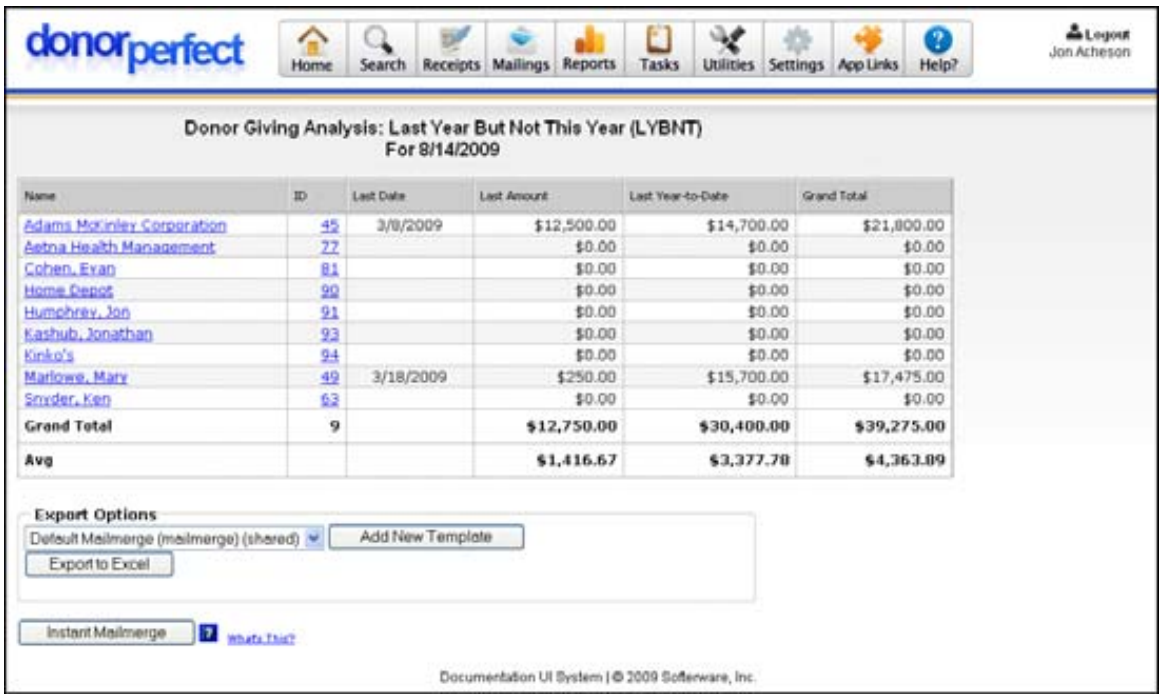
1. From the Financial Reports screen, choose **Direct Mail Reports** in the **Select a Category** section, and then select **Gift Range Report** in the **Select a Report** section.
2. Select the **Field to use in report**.
3. Fill in your desired gift amount ranges in the **Gift Split** boxes.

Note: The Gift Split boxes allow a user to create a gift range criteria for which donors will be broken down into gift types. These values are completed by default if you set them up in Settings/Parameters/User Settings.

4. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Last Year But Not This Year (LYBNTY) Report

The **LYBNTY Report** shows donors who gave last year but not this year.

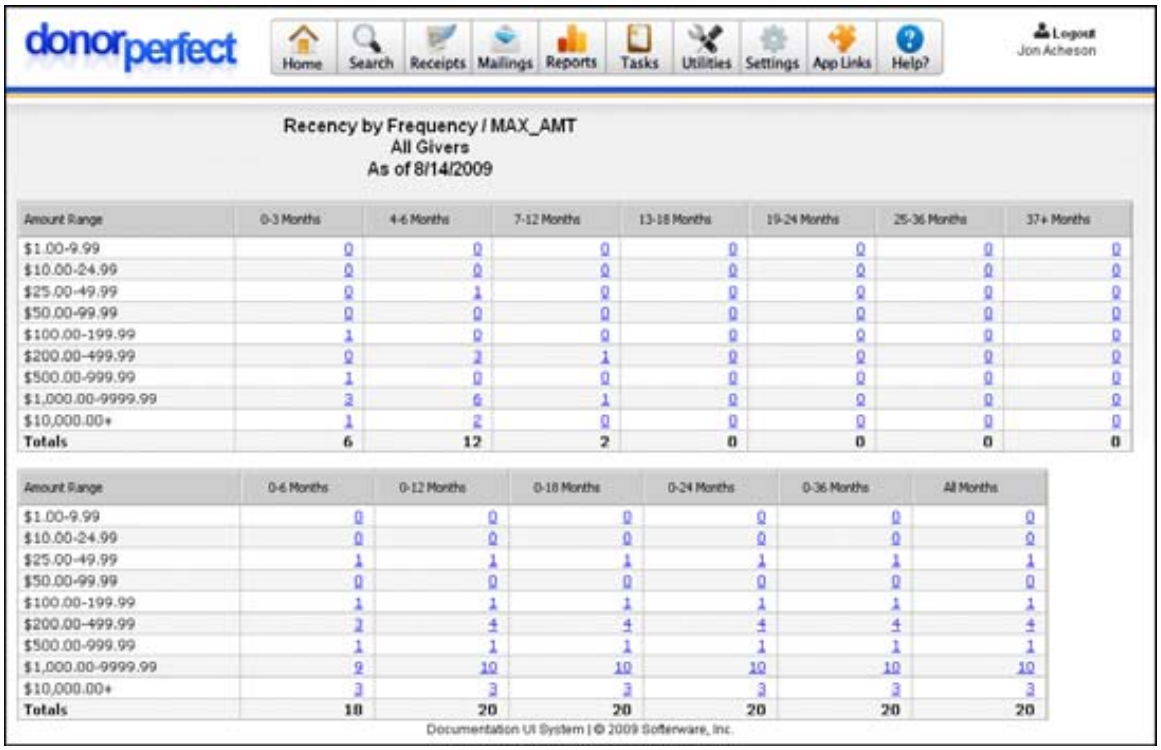


▶ To view the LYBNTY Report

1. From the **Financial Reports** screen, choose **Direct Mail Reports** in the **Select a Category** section, and then select **LYBNTY** in the **Select a Report** section.
2. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
3. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date in the title of the report.
4. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Recency by Frequency Report

The **Recency by Frequency Report** provides you with gift amount ranges and how many gifts for each range have been made within a certain time period. The report also shows you the total amount of gifts for each time period.



▶ To view the Recency by Frequency Report

1. From the **Financial Reports** screen, choose **Direct Mail Reports** in the **Select a Category** section, and then select **Recency by Frequency** in the **Select a Report** section.
2. Enter the **Ending Date**.
3. Select the **Field to use in report**. The values in this field will be used to separate gifts into the ranges set up in the **Gift Splits** fields.
4. Select donor type between **All Donors**, **Multiple Gift Donors**, and **Single Gift Donors**.
5. Fill in your desired gift amount ranges in the **Gift Split** boxes.

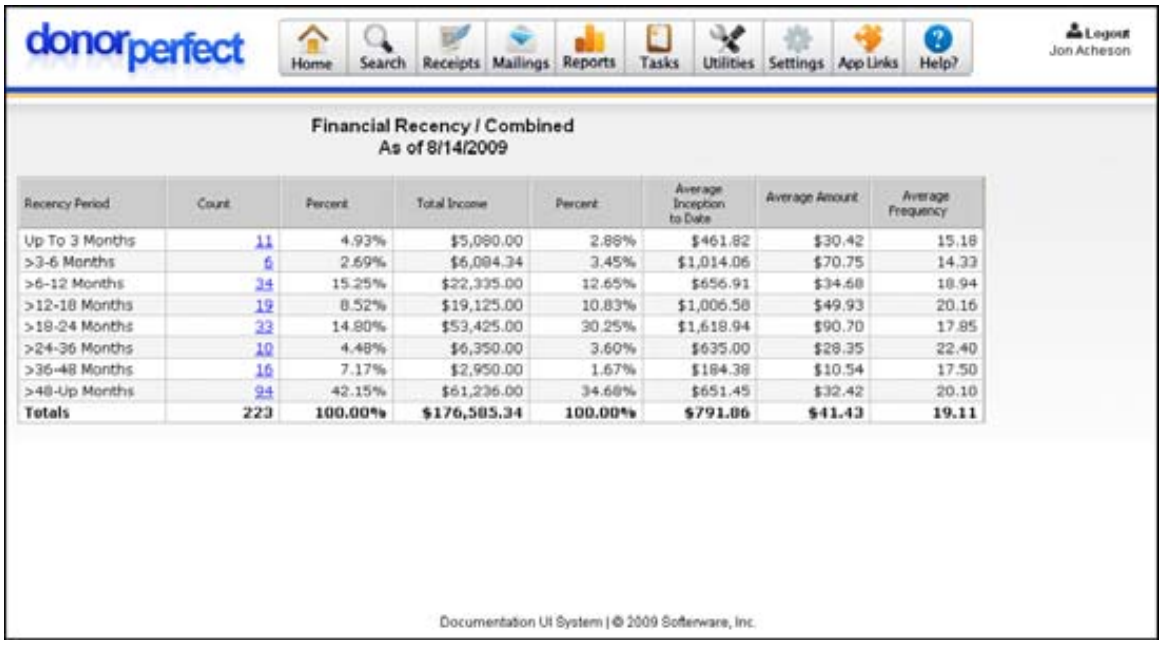
Note: The Gift Split boxes allow a user to create a gift range criteria for which donors will be broken down into gift types. These values are completed by default if you set them up in Settings/Parameters/User Settings.

6. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.

7. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the ending date in the title of the report.
8. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Recency Report

The **Recency Report** provides date ranges and the number of donations made during each date range. This report also shows the percentage of gifts for each range, the total income for each range, the percent of total income for each range, the average inception to date of all the gifts for each range, the average amount of all gifts for each range, and the average frequency for the gifts within each range.



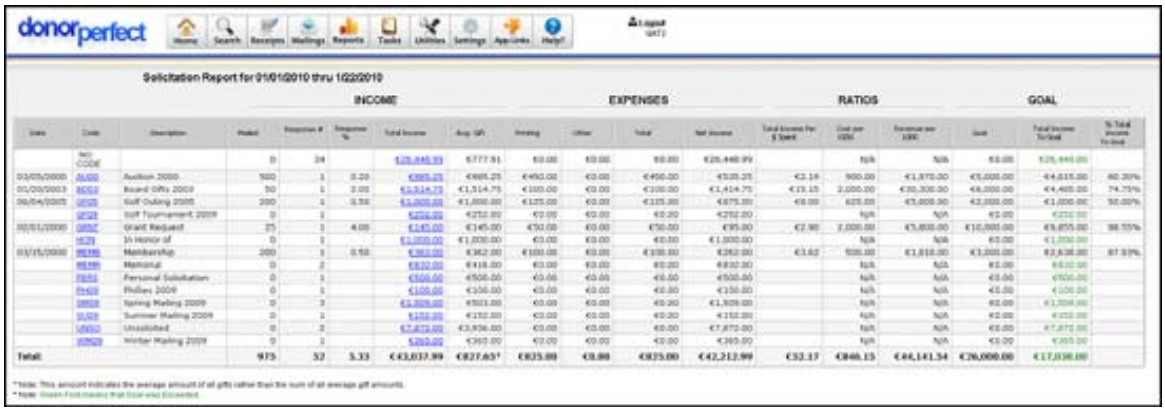
Recency Period	Count	Percent	Total Income	Percent	Average Inception to Date	Average Amount	Average Frequency
Up To 3 Months	11	4.93%	$5,080.00	2.88%	$461.82	$30.42	15.18
>3-6 Months	6	2.69%	$6,084.34	3.45%	$1,014.06	$70.75	14.33
>6-12 Months	34	15.25%	$22,335.00	12.65%	$656.91	$34.68	18.94
>12-18 Months	19	8.52%	$19,125.00	10.83%	$1,006.58	$49.93	20.16
>18-24 Months	33	14.80%	$53,425.00	30.25%	$1,618.94	$90.70	17.85
>24-36 Months	10	4.48%	$6,350.00	3.60%	$635.00	$28.35	22.40
>36-48 Months	16	7.17%	$2,950.00	1.67%	$184.38	$10.54	17.50
>48-Up Months	94	42.15%	$61,236.00	34.68%	$651.45	$32.42	20.10
Totals	**223**	**100.00%**	**$176,585.34**	**100.00%**	**$791.86**	**$41.43**	**19.11**

▶ To view the Recency Report

1. From the **Financial Reports** screen, choose **Direct Mail Reports** in the **Select a Category** section, and then select **Recency Report** in the **Select a Report** section.
2. Enter the **Ending Date**.
3. Select donor type.
4. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the ending date in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Solicitation Analysis Report

The **Solicitation Analysis Report** is very helpful in determining the cost effectiveness of each fundraising technique. It analyzes each solicitation type by the following factors – total income generated, number of persons contacted, response rate, average gift size, and net profit. The report also lists the cost of each method of solicitation. Number contacted and costs are entered through **Settings, Code Maintenance** (see page 357 for details).



Note: Net per $ spent is calculated by dividing Total Income by Total.

▶ To view the Solicitation Analysis Report

1. From the **Financial Reports** screen, choose **Direct Mail Reports** in the **Select a Category** section, and then select **Solicitation Analysis** in the **Select a Report** section.
2. Enter the **Date Range** for the report.
3. To show solicitation codes with no gifts attached, click **Yes** next to **Include zero-dollar segments**.
4. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Statistical Analysis

See "Statistical Analysis Report" page 219.

Sub-Solicitation Analysis Report

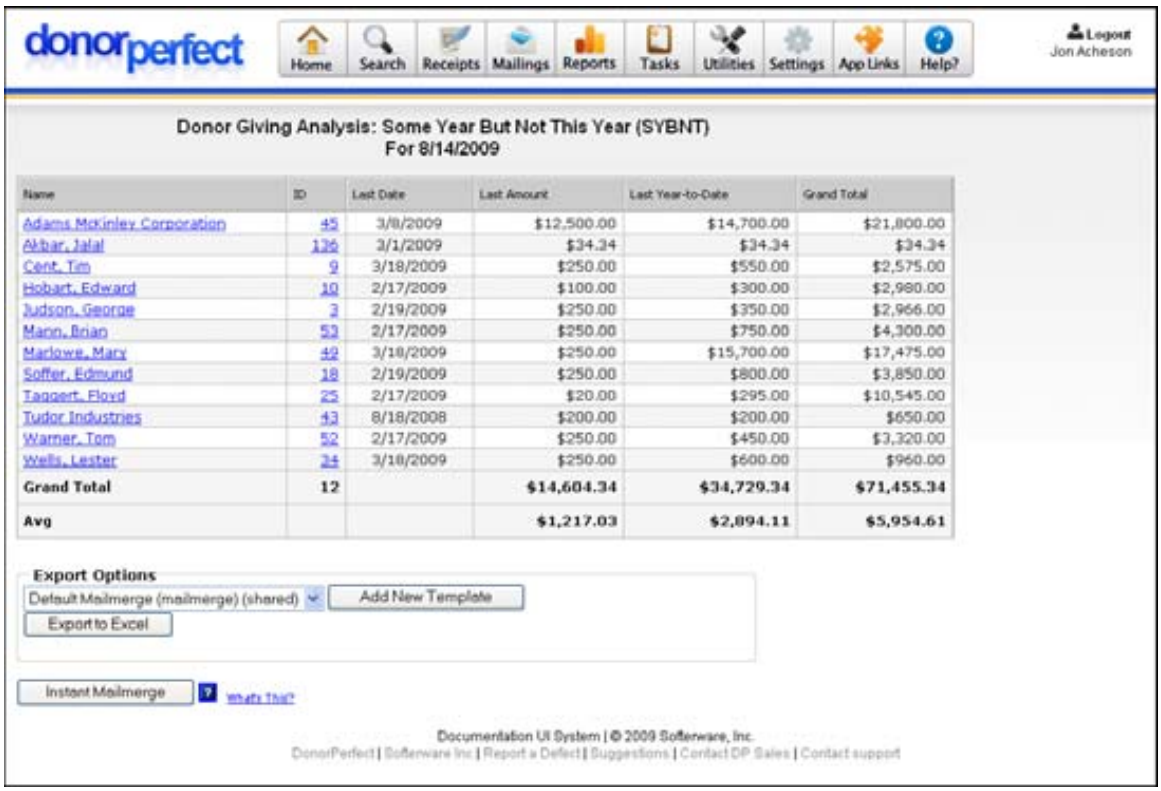
The **Sub-Solicitation Analysis Report** is helpful in determining the cost effectiveness of different packages within your mailings. This report analyzes each sub-solicitation type by the following factors: total income generated, number of persons contacted, response rate, average gift size, and net profit. The report also lists the cost of each method of solicitation. Number contacted and costs are easily managed through **Code Maintenance** (see page 357).

▶ To view the Sub-Solicitation Analysis Report

1. From the **Financial Reports** screen, choose **Direct Mail Reports** in the **Select a Category** section, and then select **Sub-Solicitation Analysis** in the **Select a Report** section.
2. Enter the **Date Range** for the report.
3. To show solicitation codes with no gifts attached, click **Ye**s next to **Include zero-dollar segments**.
4. The SQL criteria to filter solicit-codes for zero-dollar segments field allows the user to set criteria to filter out specific zero dollar segments.
5. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear underneath the date range in the title of the report.
7. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Some Year But Not This Year (SYBNTY) Report

The **SYBNTY Report** shows donors who gave one year but not this year.



▶ To view the SYBNTY Report

1. From the **Financial Reports** screen, choose **Direct Mail Reports** in the **Select a Category** section, and then select **SYBNTY** in the **Select a Report** section.
2. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
3. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
4. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Tribute Reports

The following reports are available in the Tribute Reports category:

- Tribute Listing
- Tribute Summary Listing
- Tribute Gift Listing

Tribute Listing Report

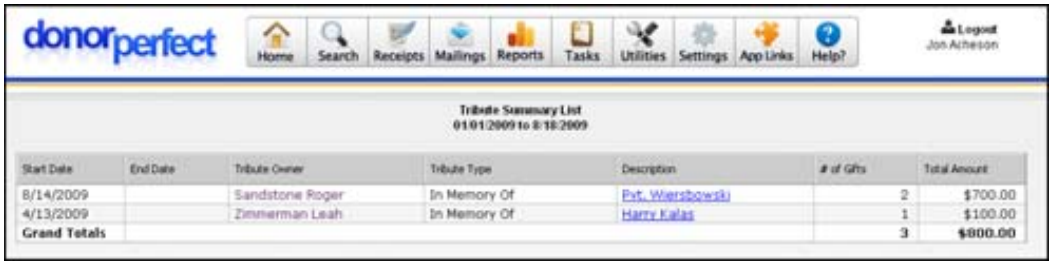
The Tribute Listing Report shows a list of all existing tributes and contributors to those tributes. It can be run on any date range.

▶ To view the Tribute Listing Report

1. From the **Financial Reports** screen, choose **Tribute Reports** in the **Select a Category** section, and then select **Tribute Listing** in the **Select a Report** section.
2. Enter the **Date Range** for the report.
3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Tribute Summary Listing

The Tribute Summary Listing Report lists all active tributes, the number of gifts made for each tribute, and the total amount donated for each tribute.

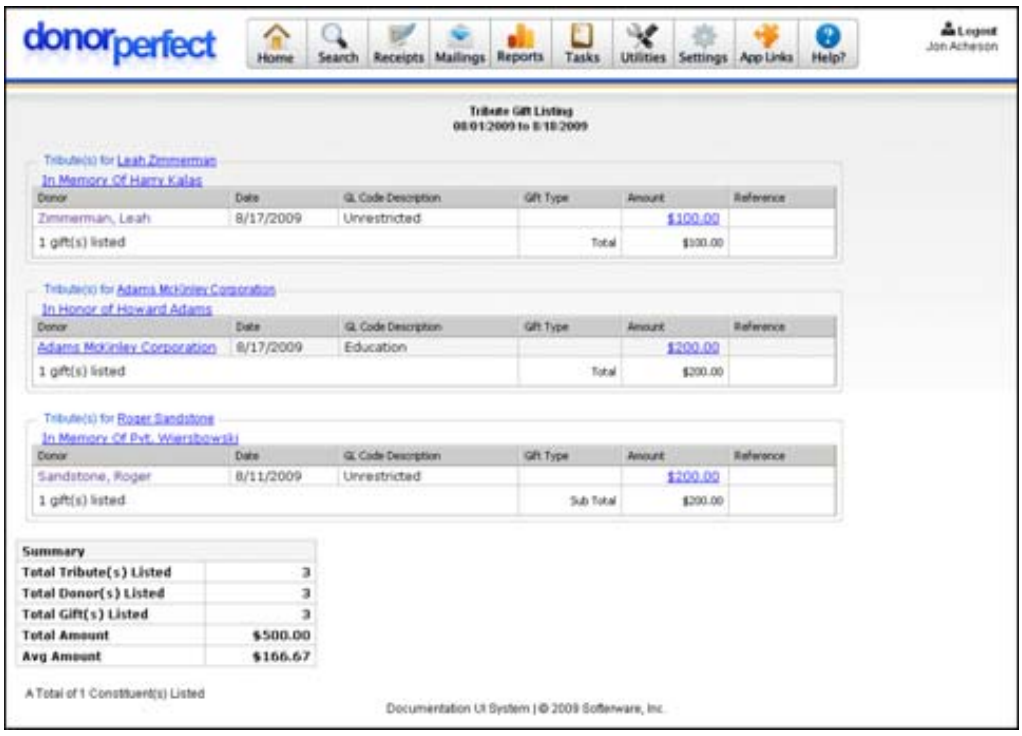


▶ To view the Tribute Summary Listing Report

1. From the **Financial Reports** screen, choose **Tribute Reports** in the **Select a Category** section, and then select **Tribute Summary Listing** in the **Select a Report** section.
2. Enter the **Date Range** for the report.
3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Tribute Gift Listing

The Tribute Gift Listing Report lists all tributes and the gifts that have been applied.



▶ To view the Tribute Gift Listing Report

1. From the **Financial Reports** screen, choose **Tribute Reports** in the **Select a Category** section, and then select **Tribute Gift Listing** in the **Select a Report** section.
2. Enter the **Date Range** for the report.

3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

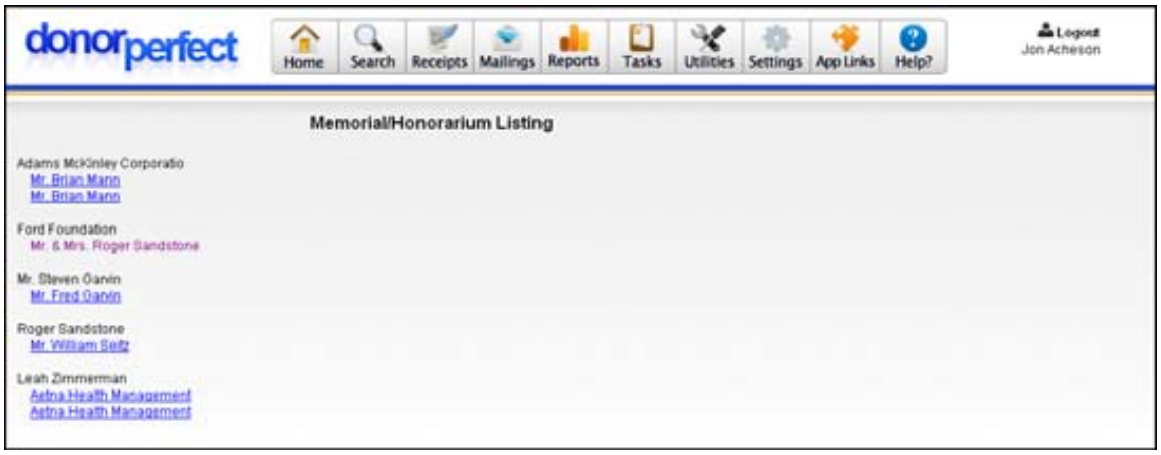
Legacy Tribute Reports

Before the Tribute feature was added to DonorPerfect Online, the Memorial/Honorarium fields on the Gift Entry screen were used to identify gifts as memorials or honorariums. The Legacy Tribute reports are similar to the Tribute reports, but work off of the older Memorial/Honorarium fields instead of the newer Tribute fields.

These reports are maintained for the convenience of users who were using the older feature.

Memorial Listing

This legacy report shows a listing of donors who made gifts in Honor or in Memory of another individual.



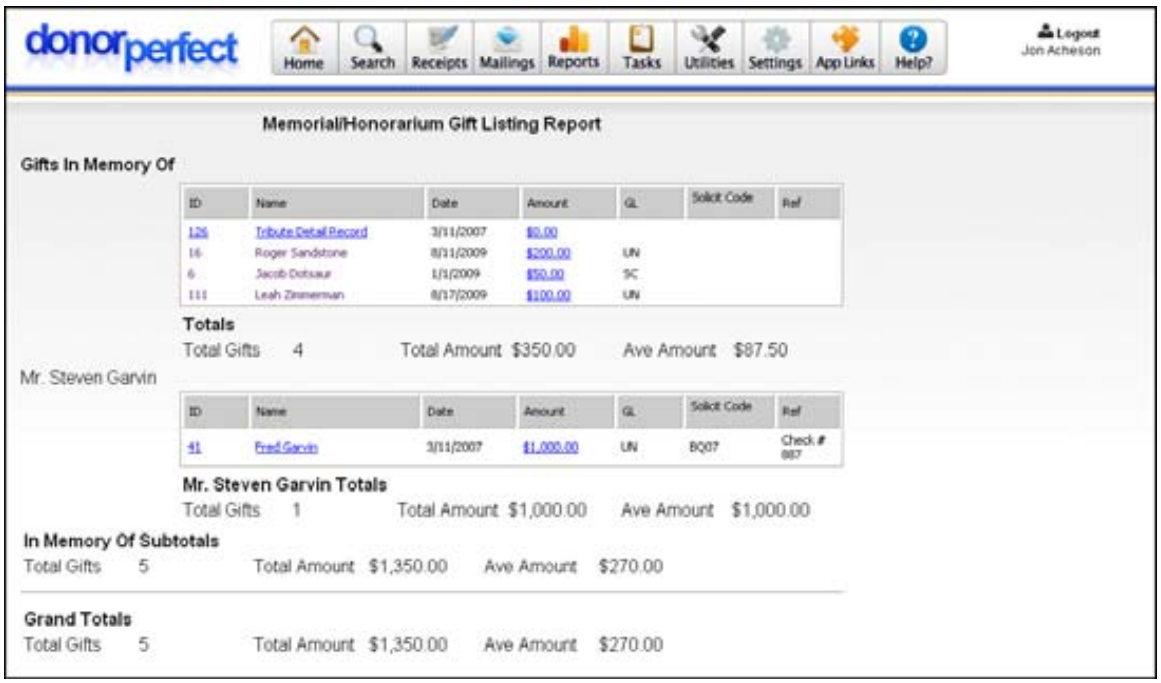
▶ To run the Memorial Listing Report

1. From the **Financial Reports** screen, choose **Legacy Tribute Reports** in the **Select a Category** section, and then select **Memorial Listing** in the **Select a Report** section.
2. Enter the **Date Range** for the report.
3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.

5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Memorial Gift Listing

This legacy report shows a listing of gifts that were made in Honor or in Memory of another individual.

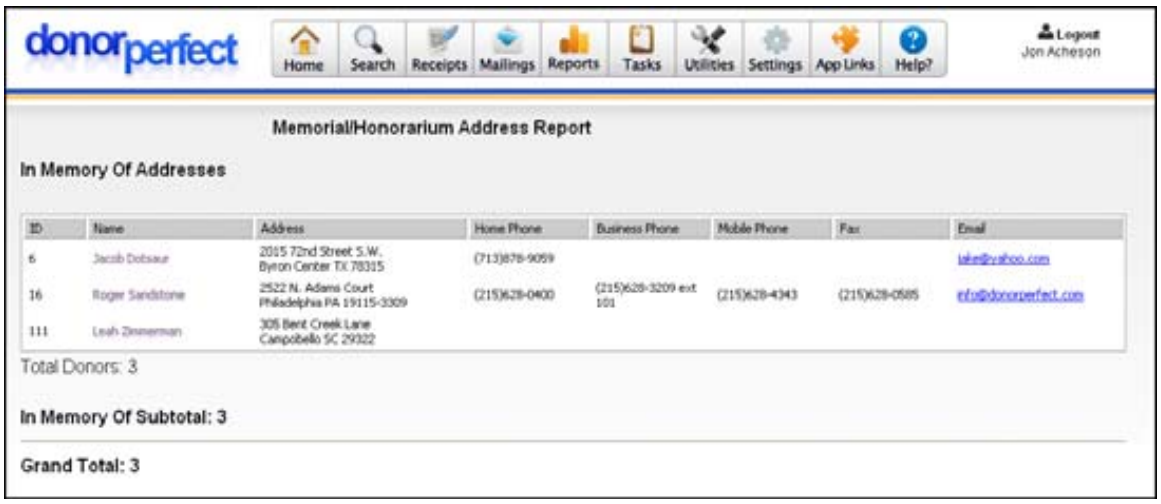


▶ To run the Memorial Gift Listing Report

1. From the **Financial Reports** screen, choose **Legacy Tribute Reports** in the **Select a Category** section, and then select **Memorial Gift Listing** in the **Select a Report** section.
2. Enter the **Date Range** for the report.
3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Memorial Address Listing

This legacy report lists all constituents that have given a gift in honor or in memory of another constituent, along with their address information.



▶ To run the Memorial Address Listing Report

1. From the **Financial Reports** screen, choose **Legacy Tribute Reports** in the **Select a Category** section, and then select **Memorial Address Listing** in the **Select a Report** section.
2. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
3. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
4. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Moves Management Financial Reports

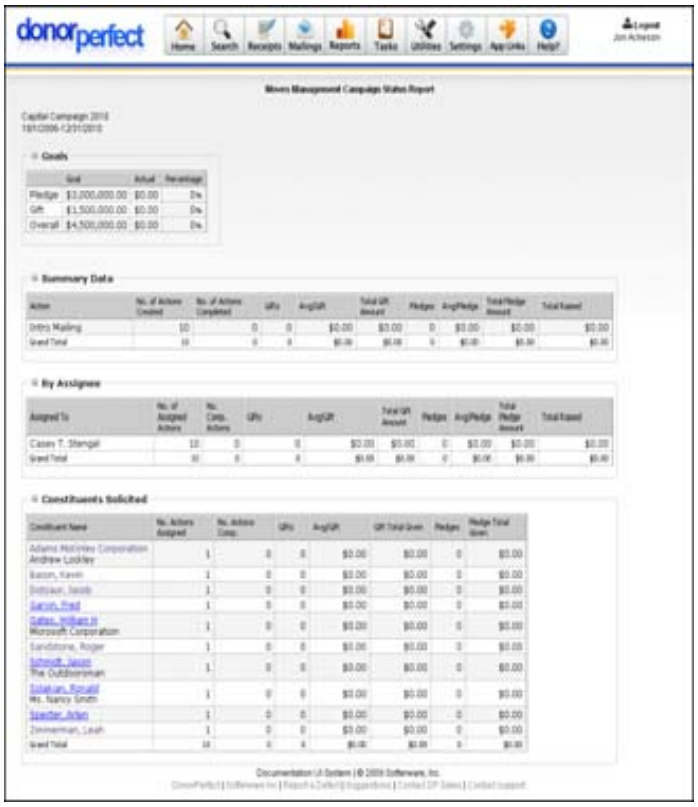
The following reports are available in the Moves Management Reports category:

- Campaign Analysis
- Campaign Comparison
- Campaign Details by Individual

> Note: To see a listing of open actions and closed actions for your Moves Management Plans, see page 186.

Campaign Analysis

The **Campaign Analysis Report** gives you a statistical breakdown of your Moves Management Plan. It details the pledge, gift, and overall goals for the plan, a summary of the actions that make up the plan, a summary of solicitor actions, and a list of the donors you solicited as part of the plan.

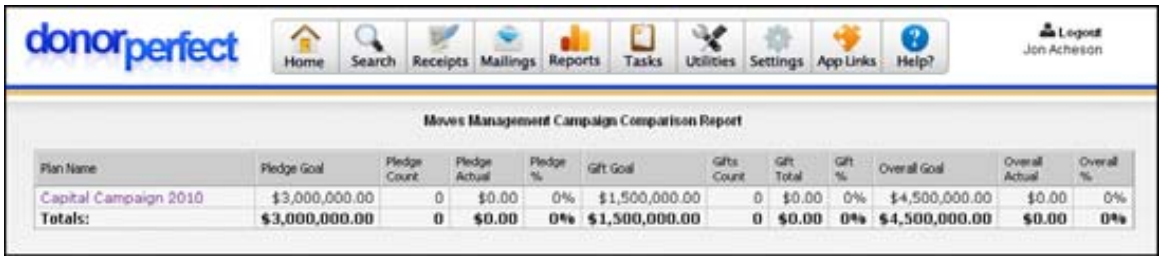


▶ To view the Campaign Analysis Report

1. From the **Financial Reports** screen, choose **Moves Management Reports** in the **Select a Category** section, and then select **Campaign Analysis** in the **Select a Report** section.
2. From the **Plan** pull-down, choose the Moves Management Plan you want to see the analysis for.
3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Campaign Comparison

The **Campaign Comparison Report** allows you to compare the effectiveness of your Moves Management Plans. For pledges, gifts, and the overall plan, this report details the goals, actual amounts, and percentage of goals met.

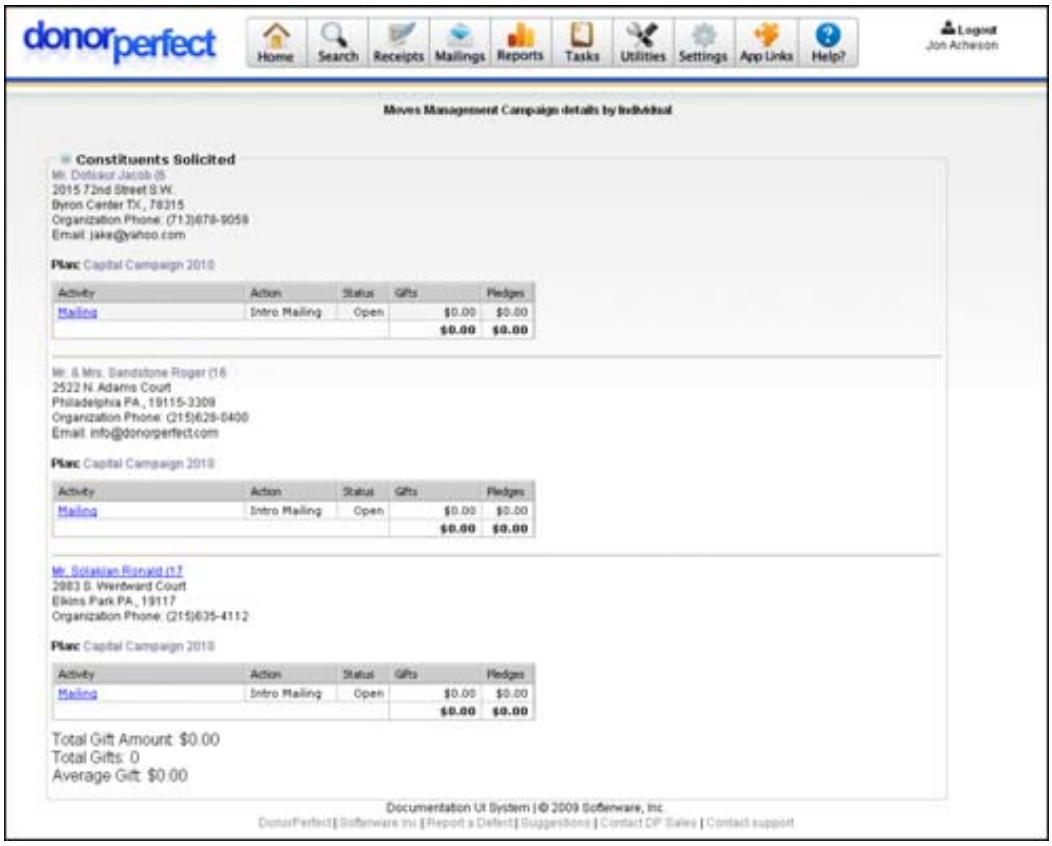


▶ To view the Campaign Comparison Report

1. From the **Financial Reports** screen, choose **Moves Management Reports** in the **Select a Category** section, and then select **Campaign Comparison** in the **Select a Report** section.
2. In the **Moves Management Plan** section, select the plans you want to compare.
3. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
4. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Campaign Details by Individual

The **Campaign Details by Individual** report lists all constituents who have been contacted as part of a Moves Management plan during a specified period of time, along with details for each contact with the constituent, and any donations that resulted from the contacts.

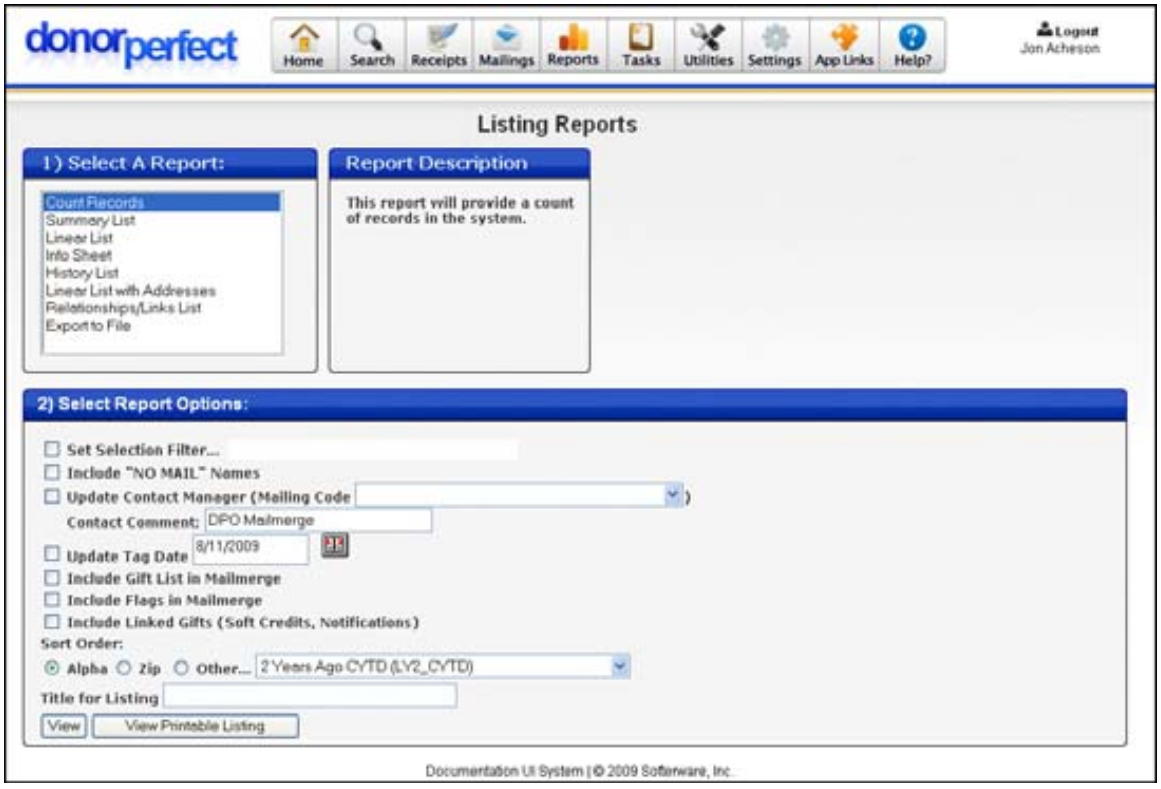


▶ To view the Campaign Details by Individual Report

1. From the **Financial Reports** screen, choose **Moves Management Reports** in the **Select a Category** section, and then select **Campaign Details by Individual** in the **Select a Report** section.
2. Enter the **Date Range** for the report.
3. In the **Moves Management Plan** section, select the plans you want to compare.
4. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
5. Output the report using one of the output buttons at the bottom of the screen. See "Report Output Selections," page 199 for details.

Listings

This option displays the **Listing Reports Screen**. This screen allows you to select from a variety of listing formats, such as History, Summary, Linear, and Information Sheet.



Unless indicated otherwise, the procedure to run and print each list is identical.

▶ To run a listing

1. From the Navigation bar, select **Reports** and then click the **Listings** link. The **Listing Reports** screen appears.
2. Select the desired listing from the **Select a Report** list. See the following pages for a description and screen shot of each list.
3. Check **Set Selection Filter** to filter out records that do not match the selection criteria you specify. This allows you to output only a subset of the names in the database in your listings. For details on creating a selection filter, see "Creating Selection Filters" on page 166.
4. Check the **Include "NO MAIL" Names** box if you want to include those donors who have been marked as "Do Not Send Mail."
5. Check **Update Contact Manager** to create contact records in the Contact Manager that identify that this report was run. The records selected will have a contact management transaction added, and "**Mailing"** (**MAILING** field) will be updated with the Mail Code entered. The completed date will be filled with

the current date. The contents of the **Contact Comment** field will be added to the comment section of the contact.

6. Check **Update Tag Date** to update the selected records' **Tag Date** field with the date entered in the field. Today's date is entered by default.

   Tag dates are primarily used for two-pass criteria selections.

> Note: See "Running Two Pass Selections" on page 176 for detailed procedural information on running two-pass selections. When running a report, an asterisk (*) will be beside the report count detail, indicating if NO MAIL names are included or not.

7. Set **Sort Order** to one of the following:

   - **Alpha:** Records will be sorted alphabetically.
   - **Zip:** Records will be sorted numerically by zip code, and then alphabetically within each zip code.

> Note: The system will always ask if you want a printout when labels, mail merges, or lists are run in zip code order.

   - **Other:** Records will be sorted according to the contents of some other field in the database. Select the field from the list provided.

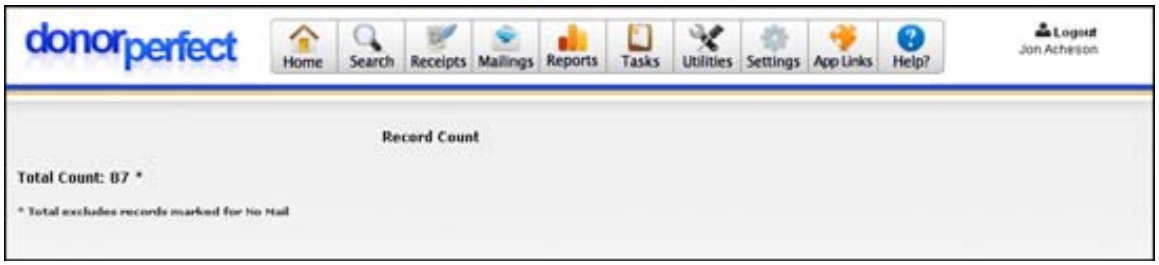
8. Optional: type in a **Title for listing**. This will appear in the title area above the body of the report, just under the name of the listing.

9. Click one of the following buttons:

   - **View** displays the report as a regular page in DonorPerfect Online, with the standard navigation toolbar at the top of the page.
   - **View Printable Listing** displays the report in a new browser window, without the navigation toolbar. This version of the report is more suitable for printout.

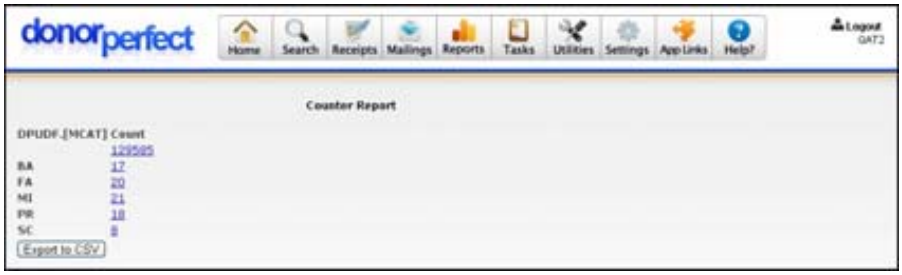
Count Records

The **Count Records** option shows a count of the number of donors selected with the current selection filter and other report options.



Counter Report

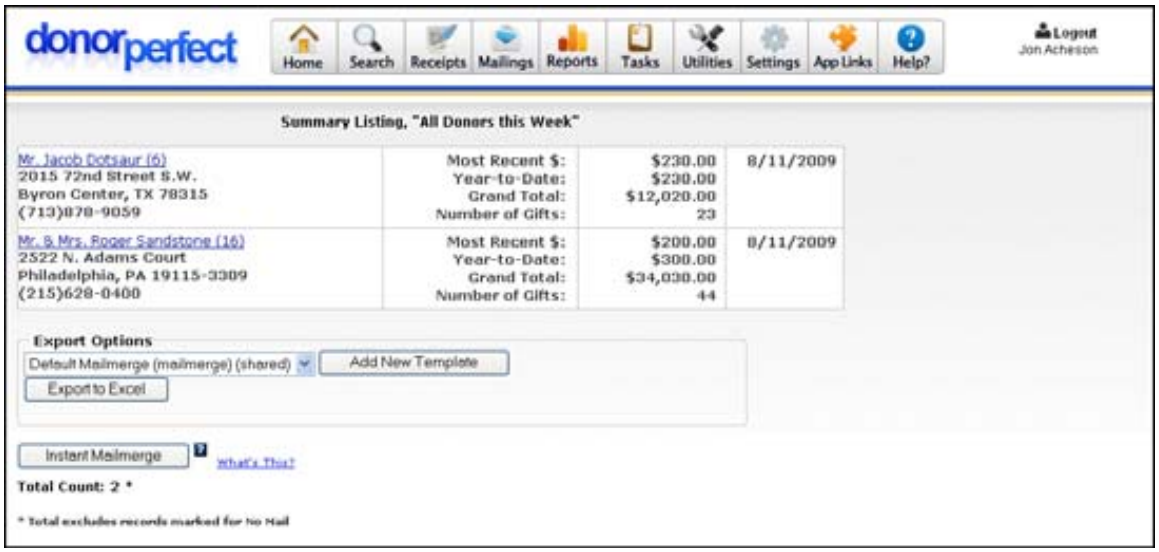
The Counter Report listing allows the user to list the values for a field, and group them according to the values in another field. The number of records is listed as a subtotal for each group, and a grand total at the end of the report.



Summary List

The **Summary Listing** provides name, address, phone(s), and a summary of each donor's gift history (amount and date of the most recent gift, year to date total, grand total, and total number of gifts).

If a selection filter is used, the name of the filter will appear in the title of the listing.



Info Sheet

The **Info Sheet** prints information from a donor's record – name, flags, type, narrative, gift, and pledge information.

donorperfect — Home | Search | Receipts | Mailings | Reports | Tasks | Utilities | Settings | App Links | Help? — Logout Jon Acheson

Info Sheet, "(Jacob Dotsaur)"

Mr. Jacob Dotsaur (6)
2015 72nd Street S.W.
Byron Center, TX 78315

Prof. Title:
Home Phone: (713)878-9059
Business Phone:
Mobile Phone:
Email: jake@yahoo.com
Flags:
Record #: 6
Entry Date: 3/30/1997

Year-to-Date: $230.00
1 Year ago YTD: $700.00
2 Years ago YTD: $200.00
3 Years ago YTD: $150.00
4 Years ago YTD: $500.00

Initial Date: 3/26/2000
Most Recent Date: 8/11/2009
Largest Gift: $1,000.00
Grand Total: $12,020.00
Number of Gifts: 23

Narrative:

Date	Amount	Pledge Total	Balance	GL	SOL	Reference
08/11/2009	$230.00	$0.00	$0.00	Unrestricted		
02/17/2009	$500.00	$0.00	$0.00	Unrestricted	WM09	
10/10/2008	$200.00	$0.00	$0.00	Unrestricted	FB08	
10/15/2007	$200.00	$0.00	$0.00	Unrestricted	FM07	
04/15/2007	$150.00	$0.00	$0.00	Unrestricted	SM07	
06/01/2006	$250.00	$0.00	$0.00	Building Fund	SM06	#6723
02/15/2006	$150.00	$0.00	$0.00	Unrestricted	SM06	
02/01/2006	$100.00	$0.00	$0.00	Disaster Relief	UNSO	#7861
06/08/2005	$250.00	$0.00	$0.00	Building Fund	SM04	#4543
03/17/2005	$15.00	$0.00	$0.00	Unrestricted	UNSO	
01/03/2005*	$200.00	$0.00	$0.00	Unrestricted	SCRE	Check # 2908
12/27/2004	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
09/23/2004	$1,000.00	$0.00	$0.00	Unrestricted	PH02	Check # 23423
07/12/2004	$75.00	$0.00	$0.00	Unrestricted	UNSO	Check # 897
01/15/2004	$25.00	$0.00	$0.00	Unrestricted	UNSO	Visa
05/02/2003	$25.00	$0.00	$0.00	Membership Auxilary	MEMB	Visa 4322-3343-6675
08/07/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	#56789
07/11/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	#44566
07/10/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
06/10/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
05/10/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
04/10/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
03/08/2002	$0.00	$10,000.00	$0.00	Unrestricted	PH02	
03/08/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
03/26/2000	$850.00	$0.00	$0.00	Unrestricted	AU00	#111

Order Total $0.00
Grand Total $12,220.00

Export Options
Default Mailmerge (mailmerge) (shared) | Add New Template | Export to Excel

Instant Mailmerge | What's This?

Total Count: 1 *

* Total excludes records marked for No Mail

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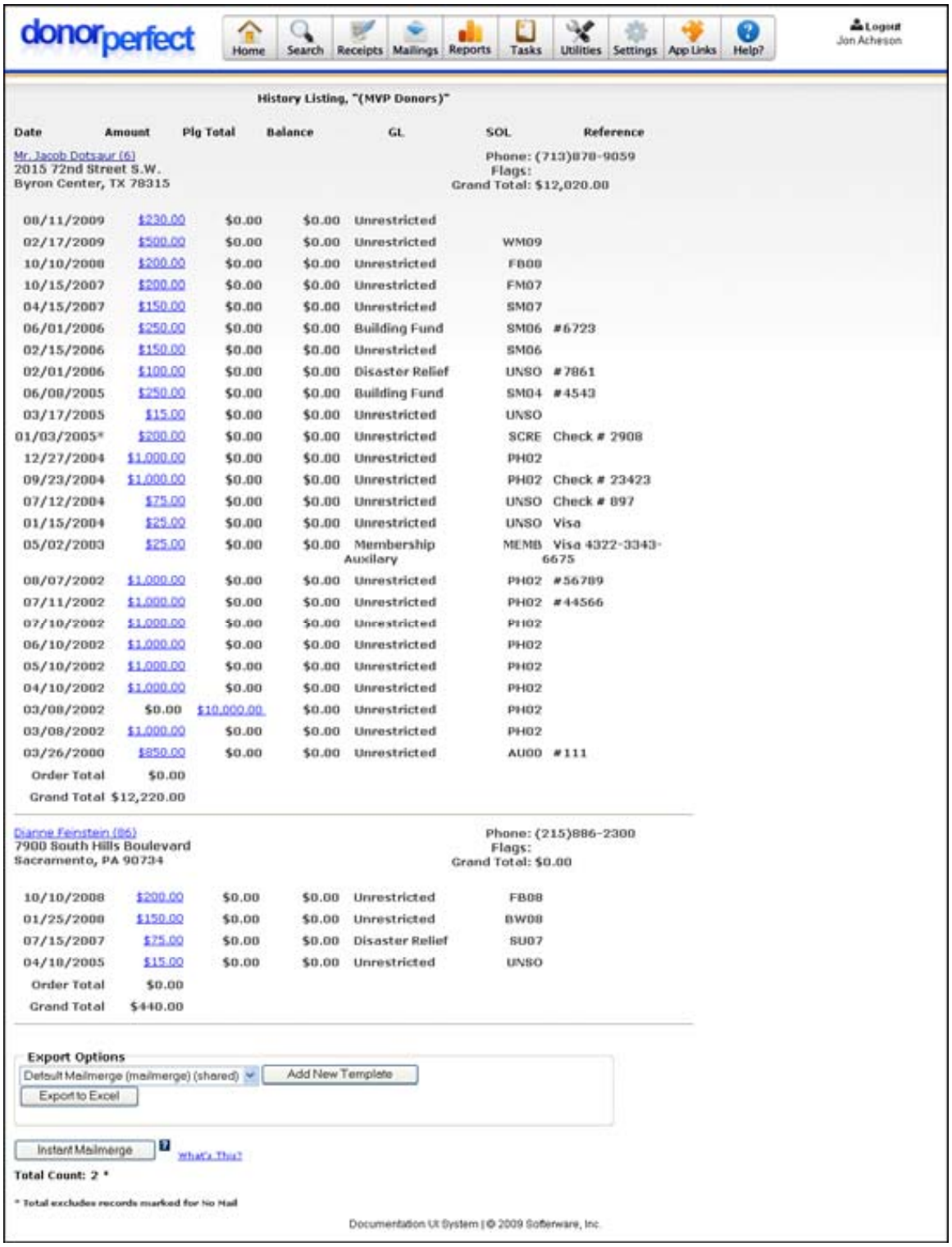
History Listing

The **History Listing** shows the donor's name, address, phone(s), and giving history in its entirety.



donorperfect — Home | Search | Receipts | Mailings | Reports | Tasks | Utilities | Settings | App Links | Help? — Logout Jon Acheson

History Listing, "(MVP Donors)"

Date	Amount	Pg Total	Balance	GL	SOL	Reference
Mr. Jacob Dotsaur (6) 2015 72nd Street S.W. Byron Center, TX 78315					Phone: (713)878-9059 Flags: Grand Total: $12,020.00	
08/11/2009	$230.00	$0.00	$0.00	Unrestricted		
02/17/2009	$500.00	$0.00	$0.00	Unrestricted	WM09	
10/10/2008	$200.00	$0.00	$0.00	Unrestricted	FB08	
10/15/2007	$200.00	$0.00	$0.00	Unrestricted	FM07	
04/15/2007	$150.00	$0.00	$0.00	Unrestricted	SM07	
06/01/2006	$250.00	$0.00	$0.00	Building Fund	SM06	#6723
02/15/2006	$150.00	$0.00	$0.00	Unrestricted	SM06	
02/01/2006	$100.00	$0.00	$0.00	Disaster Relief	UNSO	#7861
06/08/2005	$250.00	$0.00	$0.00	Building Fund	SM04	#4543
03/17/2005	$15.00	$0.00	$0.00	Unrestricted	UNSO	
01/03/2005*	$200.00	$0.00	$0.00	Unrestricted	SCRE	Check # 2908
12/27/2004	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
09/23/2004	$1,000.00	$0.00	$0.00	Unrestricted	PH02	Check # 23423
07/12/2004	$75.00	$0.00	$0.00	Unrestricted	UNSO	Check # 897
01/15/2004	$25.00	$0.00	$0.00	Unrestricted	UNSO	Visa
05/02/2003	$25.00	$0.00	$0.00	Membership Auxilary	MEMB	Visa 4322-3343-6675
08/07/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	#56789
07/11/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	#44566
07/10/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
06/10/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
05/10/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
04/10/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
03/08/2002	$0.00	$10,000.00	$0.00	Unrestricted	PH02	
03/08/2002	$1,000.00	$0.00	$0.00	Unrestricted	PH02	
03/26/2000	$850.00	$0.00	$0.00	Unrestricted	AU00	#111
Order Total	$0.00					
Grand Total	$12,220.00					
Dianne Feinstein (86) 7900 South Hills Boulevard Sacramento, PA 90734					Phone: (215)886-2300 Flags: Grand Total: $0.00	
10/10/2008	$200.00	$0.00	$0.00	Unrestricted	FB08	
01/25/2008	$150.00	$0.00	$0.00	Unrestricted	BW08	
07/15/2007	$75.00	$0.00	$0.00	Disaster Relief	SU07	
04/10/2005	$15.00	$0.00	$0.00	Unrestricted	UNSO	
Order Total	$0.00					
Grand Total	$440.00					

Export Options
Default Mailmerge (mailmerge) (shared) | Add New Template | Export to Excel

Instant Mailmerge | What's This?

Total Count: 2 *

* Total excludes records marked for No Mail

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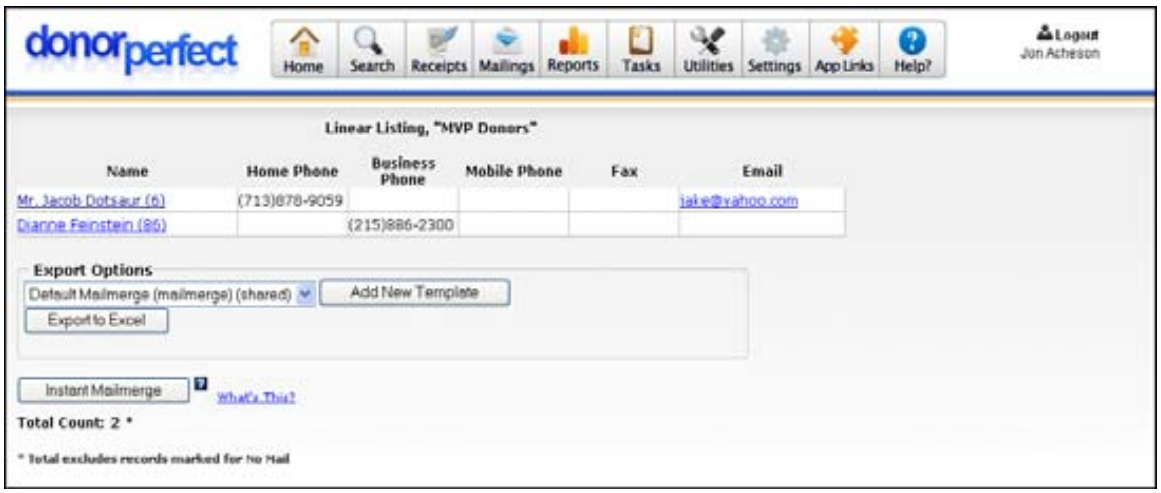
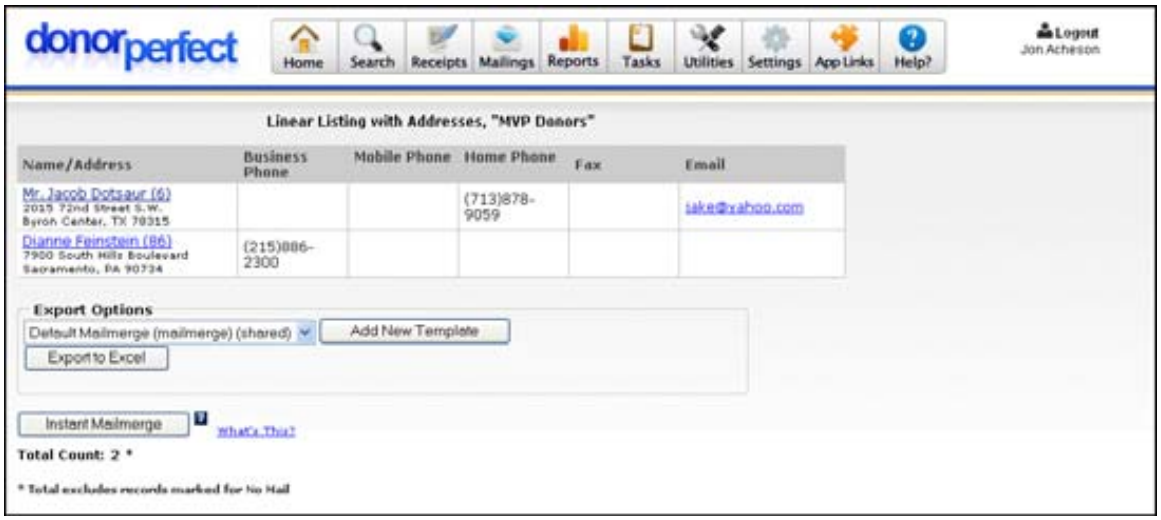
Linear Listing

The **Linear Listing Report** shows the phone number, fax, and email information about each donor.



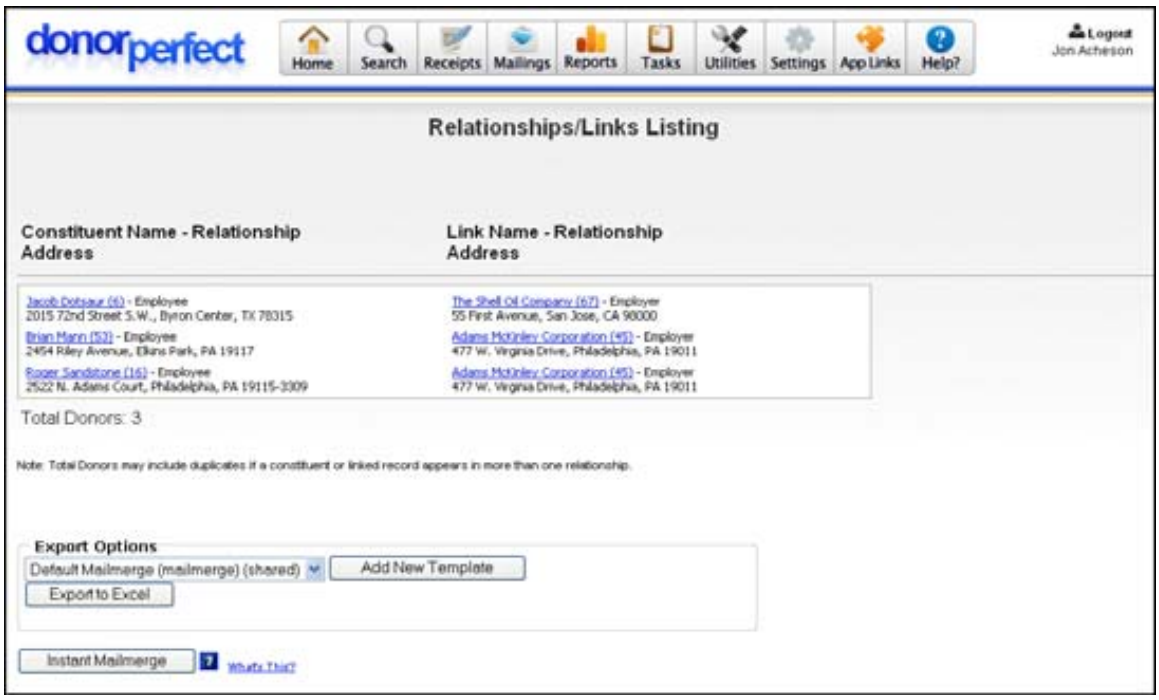
Linear List with Addresses

The **Linear Listing with Addresses Report** shows the address, phone number, fax, and email information for each donor.



Relationships/Links List

The Relationships/Links Listing report is used to display all of the relationships of a given type that have been entered into DonorPerfect Online.

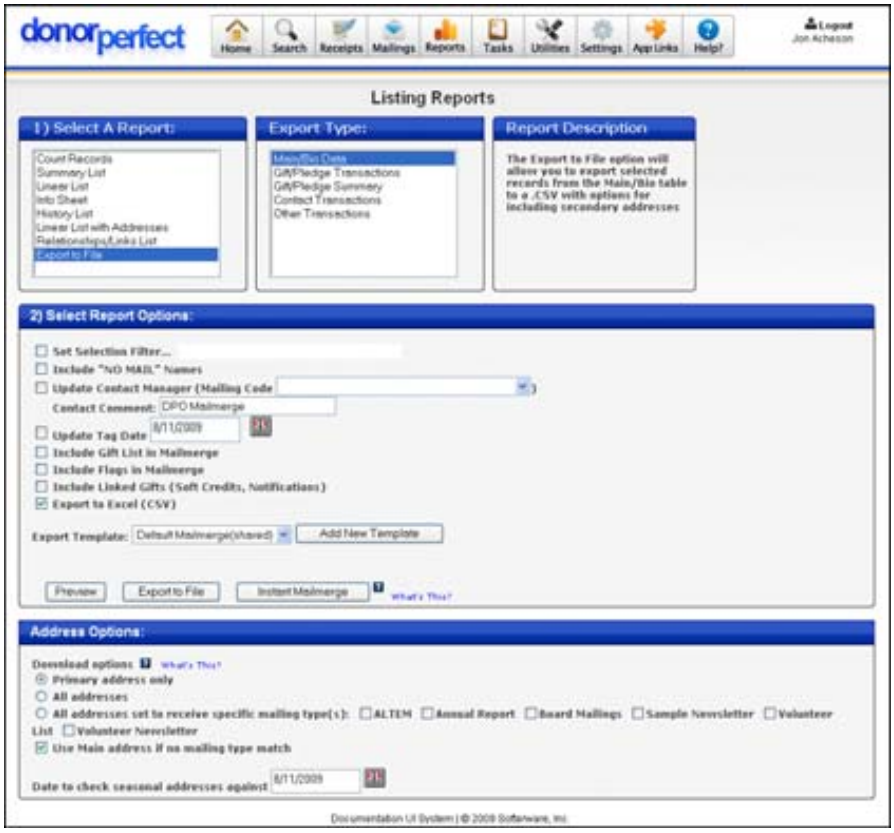


To use the report, you must select a relationship from one of the following types:

- Child-to-Parent
- Employee-to-Employer
- Employer-to-Employee
- Foundation-to-Trustee
- Grandchild-to-Grandparent
- Grandparent-to-Grandchild
- Head of Household-to-Member of Household
- Honorarium Donor-to-Honoree
- Honoree-to-Honorarium Donor
- Member of Household-to-Head of Household
- Memorial Donor-to-Next of Kin
- Next of Kin-to-Memorial Donor
- Parent-to-Child
- Trustee-to-Foundation

Export to File

The Export to File listing allows you to export information from DonorPerfect Online to a file on your computer. It works using export templates, which can be customized in the Export Templates screen (see "Export Templates" page 361 for details).



Export templates are available for the following types of information:

- Mail merge information
- Gift/pledge transaction data
- Information from the Contacts screen
- Information from the Other Info screen

The Export to File listing works somewhat differently than the other listings.

▶ To export information to a file using the Export to File listing

1. From the Navigation bar, select **Reports** and then click the **Listings** link. The **Listing Reports** screen appears.
2. Select **Export to File** from the **Select a Report** list.
3. Select the type of data you want to export from the **Export Type** list.
4. Check **Set Selection Filter** to filter out some records from being exported to your data file. See "Using Selection Filters" on page 159 for details.

5. Check **Include "NO MAIL" Addresses** to export all addresses, even the ones marked **Do Not Send Mail**.

6. If you want to update contact information for the records included in the export file, click the **Update Contact Manager** check box, and then choose the appropriate **Mailing Code**. The contents of the **Contact Comment** field will be added to the Contact Notes for the contact.

7. To use Tag Dates, click the **Update Tag Date** check box. Tag dates are primarily used for two-pass criteria selections. If checked, all records that were exported will have their "Tag Date" (field name **tagged**) revised to reflect the date entered in the field.

Note: See "Running Two Pass Selections" on page 176 for detailed procedural information on running two-pass selections.

8. To include a listing of all constituent donations into one field in the export file, click the **Include gift list in Mailmerge** check box.

9. If **Include Flags in Mailmerge** is checked, a field will be added to the export file that contains a comma-separated list of all the flags for each donor.

10. If you want the export file to be exported in a format that can be opened in Microsoft Excel, click the **Export to Excel** check box.

11. If you've created an export template you want to use for the export file, choose it from the **Export Template** pull-down. This template defines which fields will be included in the file you export. For more information on export templates, see page 361.

12. To preview the export:

    a. Click the **Preview** button.

       A new window will open, displaying the export data in a large HTML table.

    b. Once you have finished reviewing the data, you can either close the preview window or click the **Export to File** button to continue.

13. To create the export data file:

    a. Click the **Export to File** button**.** A **File Download** Window will appear with the following options: **Open this File** or **Save this file.**

    b. Choose **Save this file to disk.** The **Save As** Window will open up.

    c. Select which drive and directory to save your file.

    d. If desired, you can edit the **File Name** (it will be **donmrg.txt** or **donmrg.csv** by default). Leave **Save As Type** as it is.

    e. Click the **Save** button to save the data file to your computer.

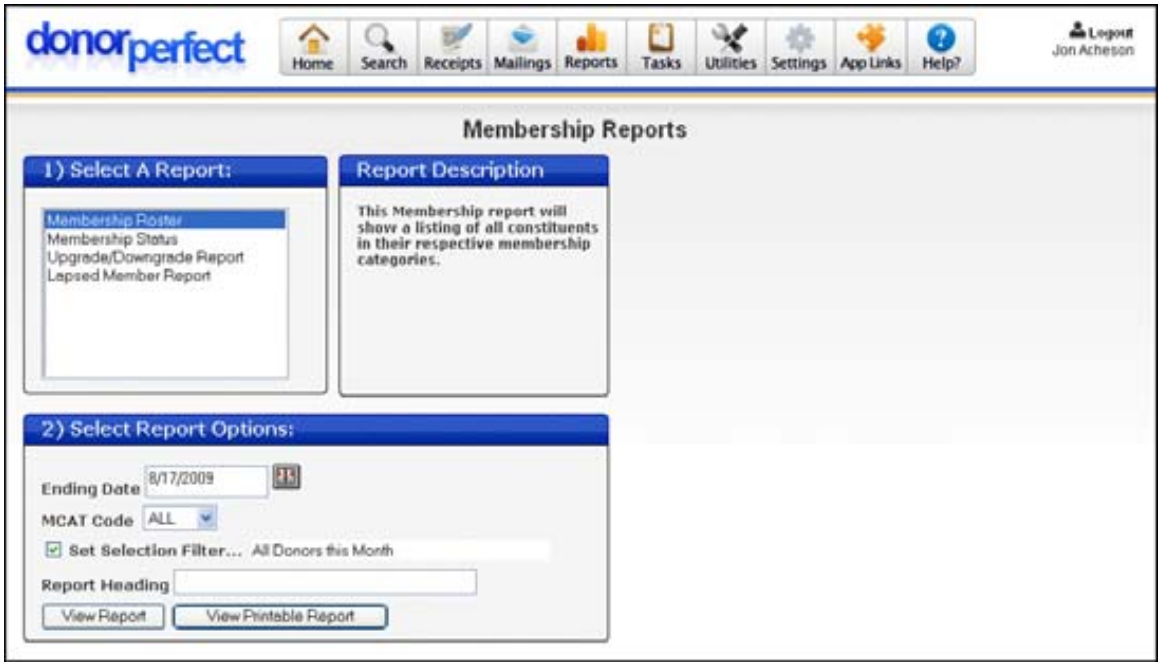
Instant Mailmerge

See "Instant Merge" page 451 for details on using the **Instant Mailmerge** button.

Membership Reports

The **Membership Reports** screen allows you to print reports related directly to membership tracking.

For details on membership tracking, see Appendix G.



▶ To run Membership Reports

1. Select **Reports**, and then click **Membership Reports**. The **Membership Reports Screen** appears.
2. You can run any of the reports by selecting the report and clicking the **View Report** button.

Membership Roster Report

The Membership Roster Report is a listing of members sorted alphabetically.

▶ To view the Membership Roster

1. From the **Membership Reports** screen select **Membership Roster**.
2. Enter the **Ending Date**.
3. Select the **MCAT Code** (Membership Category Code) for the members you want to appear in the report, or select **ALL** to include all membership categories in the report.
4. Optional: **Set Selection Filter**. See "Using Selection Filters" on page 159 for details.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen:

Outputs the report as a normal page in DonorPerfect, complete with the standard navigation toolbar.

Outputs the report as an HTML page in a new browser window, in a printer-friendly format with the navigation toolbar removed.

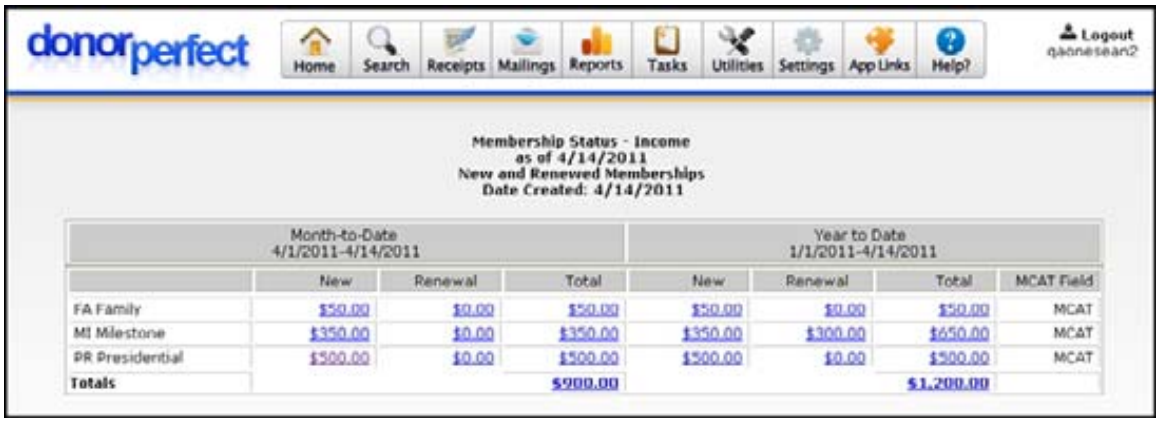
Outputs the report in Microsoft Excel format. You will be prompted to open the report directly in Excel, or save it as a file.

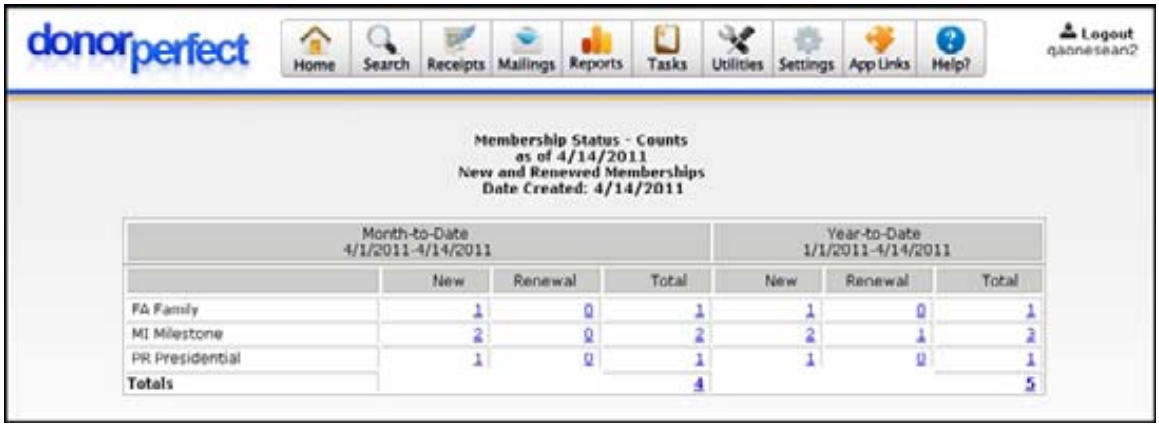
Outputs the report in Microsoft Word format. You will be prompted to open the report directly in Word, or save it as a file.

Membership Status Report

The Membership Status report shows either the income totals or the membership counts for each membership category. For each total, there are also two break-out columns:

- **New** – Displays the subtotals from donors who previously had no membership status.
- **Renewed** – Displays the totals from donors who previously had a membership status at some level.





▶ To view the Membership Status - Income Report

1. From the **Membership Reports** screen select **Membership Status**.
2. In the **Ending Date**, enter the last date of the month to show in the month-to-date column.
3. Select the **MCAT Code** (Membership Category Code) for the members you want to appear in the report, or select **ALL** to include all membership categories in the report.
4. Select **Income** to display the income totals for each category, or **Counts** to display the membership counts.
5. Select to run the report for the **Fiscal Year** or **Calendar Year** or **Lifetime**. If **Lifetime** is selected, the report will cover all records stored in your system.

6. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
7. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
8. Output the report using one of the output buttons at the bottom of the screen:

Outputs the report as a normal page in DonorPerfect, complete with the standard navigation toolbar.

Outputs the report as an HTML page in a new browser window, in a printer-friendly format with the navigation toolbar removed.

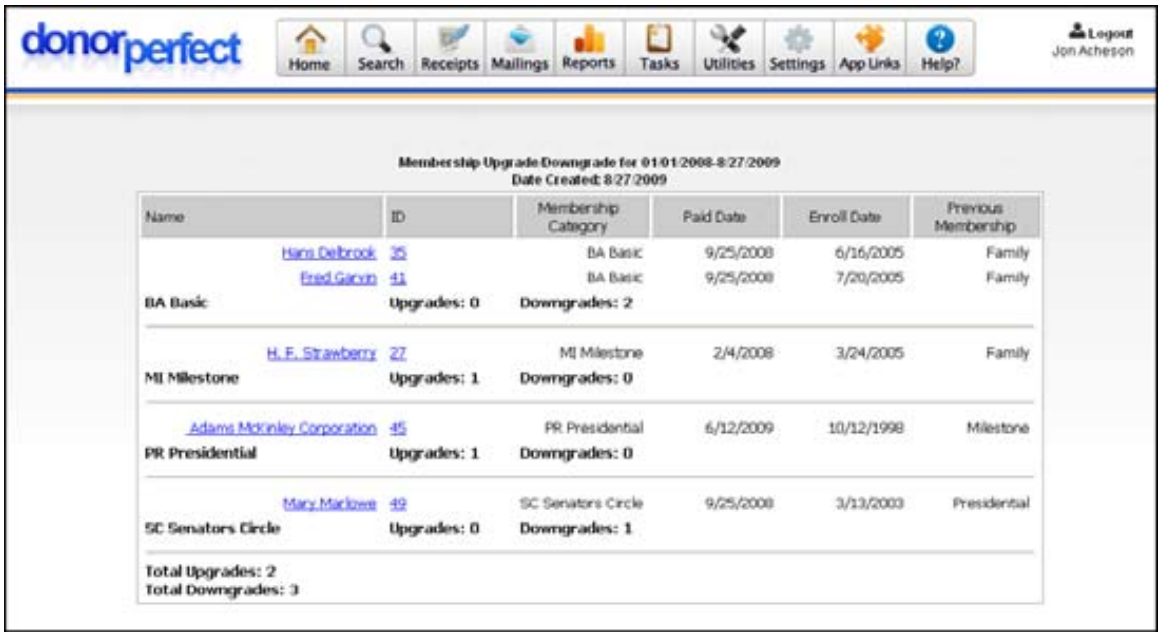
Outputs the report in Microsoft Excel format. You will be prompted to open the report directly in Excel, or save it as a file.

Outputs the report in Microsoft Word format. You will be prompted to open the report directly in Word, or save it as a file.

Note: This report is designed to run for any month in the current year. Running it for past years may show incorrect information as a donor's membership categories may have changed.

Membership Upgrade/Downgrade Report

The **Upgrade/Downgrade Report** shows totals of upgrades and downgrades per membership category. It can be printed in detail (showing members who have upgraded or downgraded in a certain time period) or summary only (totals per category only).



▶ To view the Upgrade/Downgrade Report

1. From the **Membership Reports** screen, select **Upgrade/Downgrade Report**.
2. Select the **MCAT Code** (Membership Category Code) for the members you want to appear in the report, or select **ALL** to include all membership categories in the report.
3. Enter the **Date Range** of upgrades/downgrades to display.
4. Select **Use Gift Date** to display the records whose gift dates fall within the **Date Range** specified. Select **Use Enroll Date** to select the records whose enrollment dates fall within the **Date Range** specified.
5. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
6. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
7. Output the report using one of the output buttons at the bottom of the screen:

Outputs the report as a normal page in DonorPerfect, complete with the standard navigation toolbar.

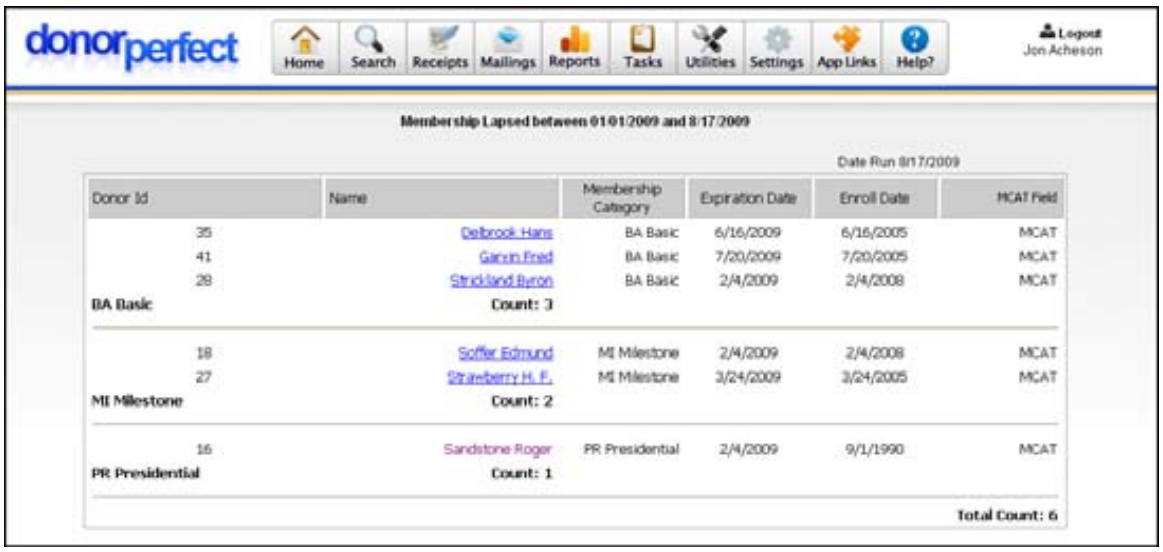
Outputs the report as an HTML page in a new browser window, in a printer-friendly format with the navigation toolbar removed.

Outputs the report in Microsoft Excel format. You will be prompted to open the report directly in Excel, or save it as a file.

Outputs the report in Microsoft Word format. You will be prompted to open the report directly in Word, or save it as a file.

Lapsed Member Report

The Lapsed Member Report shows the current listing of those members whose memberships have expired.



▶ To view the Lapsed Member Report

1. From the **Membership Reports** screen, select **Lapsed Member Report**.
2. Select the **MCAT Code** (Membership Category Code) for the members you want to appear in the report, or select **ALL** to include all membership categories in the report.
3. Enter the **Date Range** of the lapsed membership period.
4. Check **Set Selection Filter** to put a selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.
5. Enter an optional heading for the report in the **Report Heading** field. This heading will appear in the title of the report.
6. Output the report using one of the output buttons at the bottom of the screen:

Outputs the report as a normal page in DonorPerfect, complete with the standard navigation toolbar.

Outputs the report as an HTML page in a new browser window, in a printer-friendly format with the navigation toolbar removed.

Outputs the report in Microsoft Excel format. You will be prompted to open the report directly in Excel, or save it as a file.

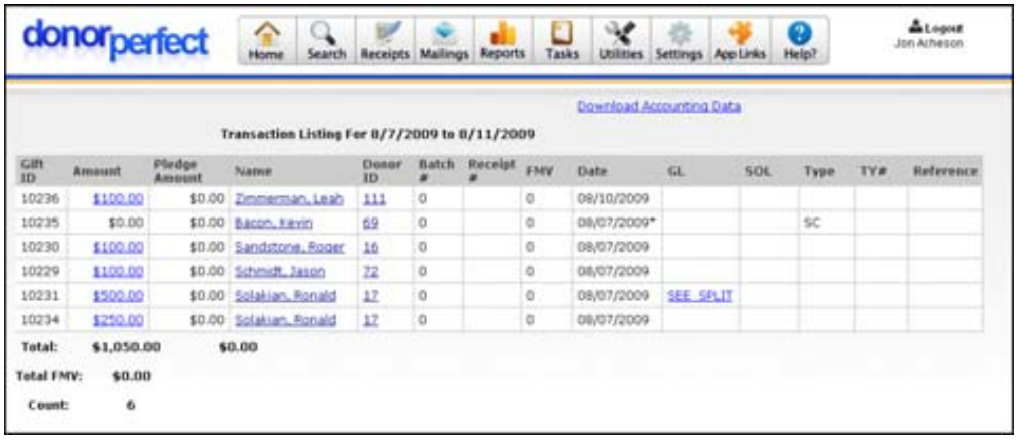
Outputs the report in Microsoft Word format. You will be prompted to open the report directly in Word, or save it as a file.

Receipts and Acknowledgments Reports

Overview

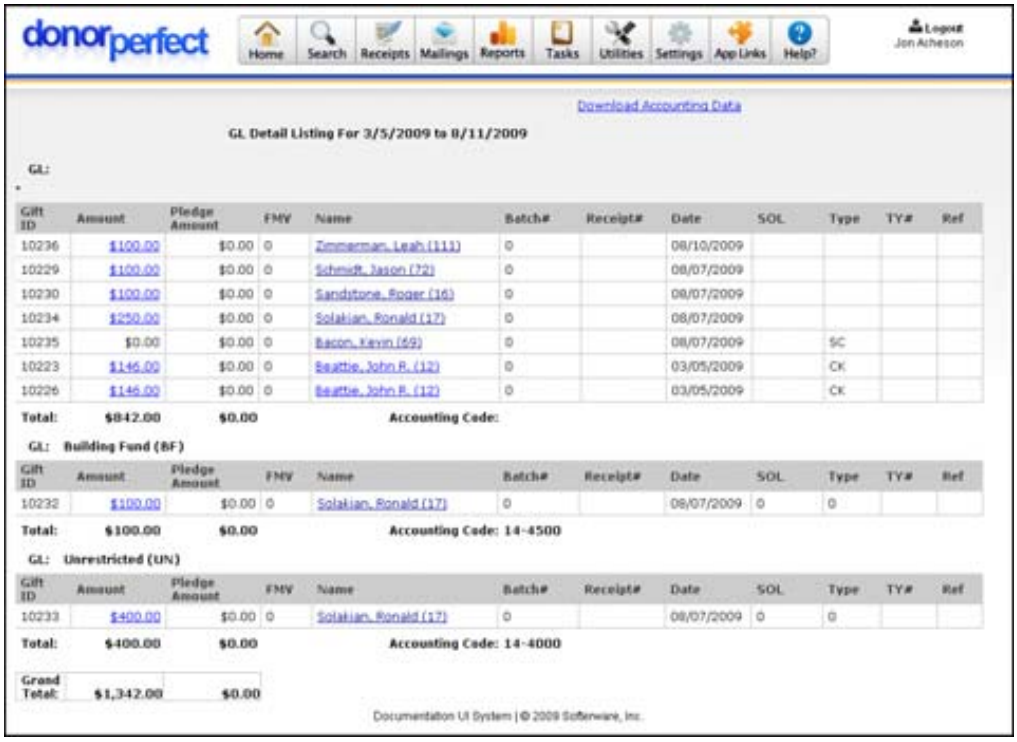
The Receipts and Acknowledgements reports allow you to view details on the gifts entered into the system since the last time that acknowledgements were processed. There are three different reports available:

- The **Transaction Listing** lists the gifts entered into the system since the last acknowledgement/receipts processing.



- The **GL Summary Listing** provides a listing by General Ledger code of gifts entered into the system since the last acknowledgements/receipts processing. The Summary listing displays the sum of all gifts for each GL code. If you use the optional Accounting Module, it also has a line for Accounting Code.

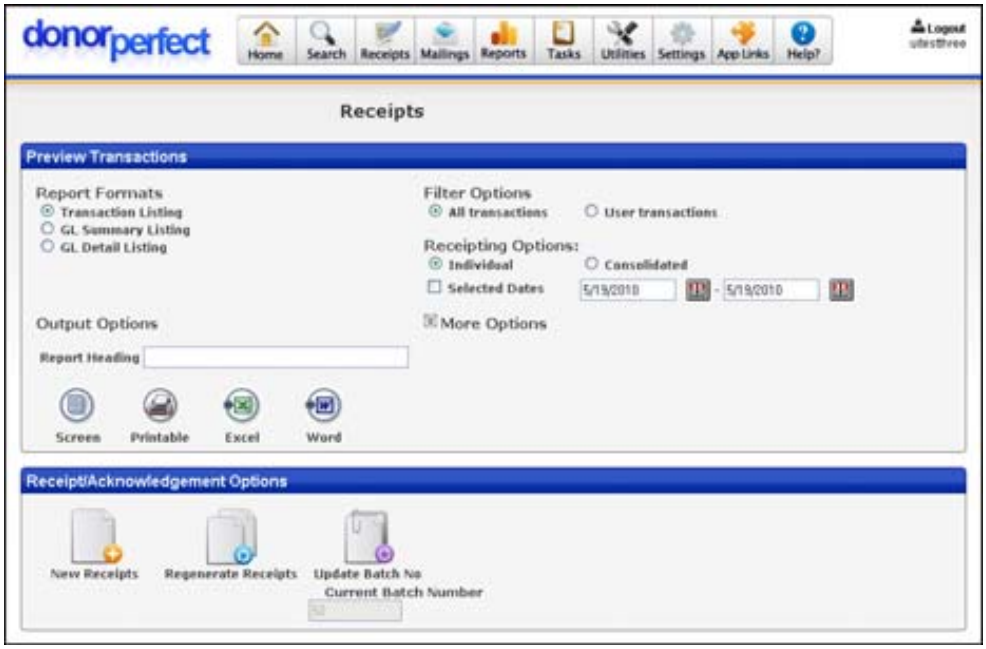
- The **GL Detail Listing** is similar to the **GL Summary Listing**, except that it lists the individual gifts for each General Ledger code.



Running the Receipts and Acknowledgements Reports

▶ To run the Receipts and Acknowledgements reports

1. In the navigation bar, click on the **Receipts** button. The Receipts and Acknowledgments screen appears.

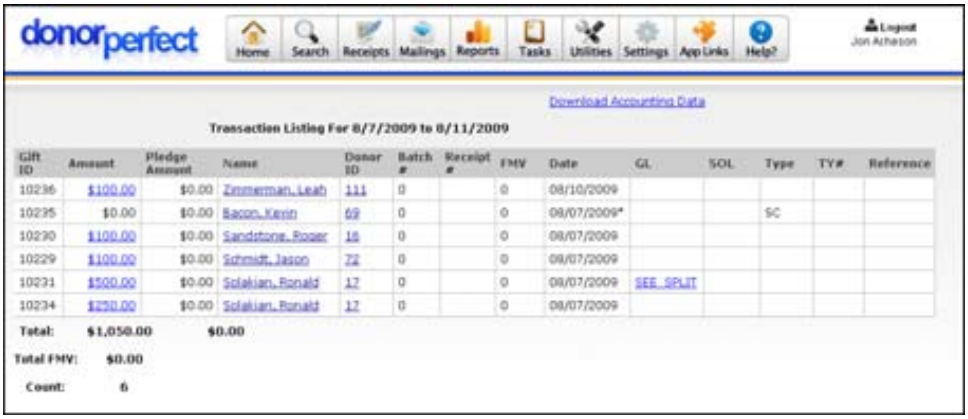


2. Enter or select the following **Selection Options**:

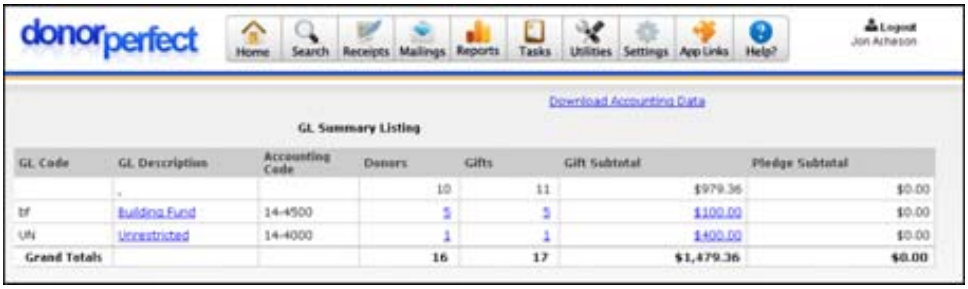
Current Batch Number	The number of the current batch. This number counts up sequentially as you complete and update batches. This field is not editable.
All/User Transactions	Select one of the following options: • Select All Transactions to display transactions from all users in the batch. • Select User Transactions to show only your current transactions.
Individual/ Consolidated Gifts	Select one of the following options: • Select Individual to display gifts that have been selected to receive individual receipts and acknowledgements. • Select Consolidated to display gifts that have been selected to be included in consolidated receipts and acknowledgements. See "Entering Gifts for Individual Receipting" on page 96 and "Entering Gifts for Consolidated Receipting" on page 107 for details on how to select individual or consolidated receipts and acknowledgements when entering a gift.
Current Batch	If checked, the system will only select gifts whose Batch Number is set to 0. This is generally only true for gifts that were added to the system after the last batch was processed.
Selected Dates	If checked, the system will select only those transactions that fall within the starting and ending dates you specify, regardless of the batch number.
Set Selection Filter	Check to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" page 159 for details.
Include Already Processed Gifts	This option includes gifts that have already been assigned to a batch or assigned a receipt number from the acknowledgement processing. It is unchecked by default.

3. Select a report **Type**:

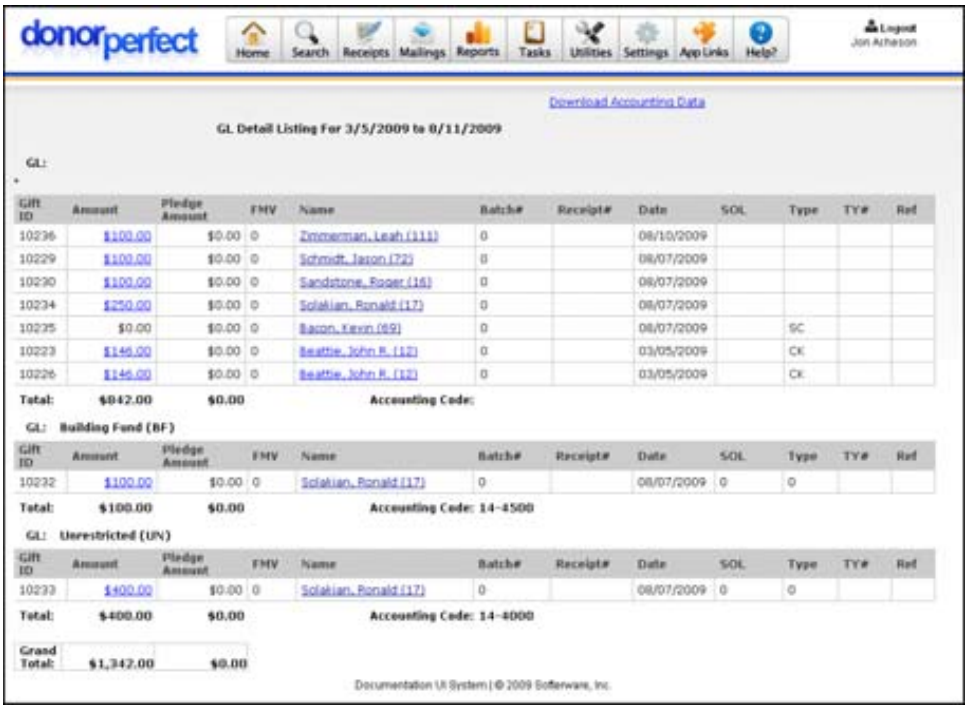
   - The **Transaction Listing** lists the gifts entered into the system since the last acknowledgement/receipts processing.



- The **GL Summary Listing** provides a listing by General Ledger code of gifts entered into the system since the last acknowledgements/receipts processing. The Summary listing displays the sum of all gifts for each GL code. If you use the optional Accounting Module, it also has a line for Accounting Code.



- The **GL Detail Listing** is similar to the **GL Summary Listing**, except that it lists the individual gifts for each General Ledger code.



4. Optionally, type in a **Report Heading** for the listing. This will appear in the title area of the report.
5. Click one of the following buttons:
   - **Screen** displays the report as a regular page in DonorPerfect Online, with the standard navigation toolbar at the top of the page.
   - **Printable** displays the report in a new browser window, without the navigation toolbar. This version of the report is more suitable for printout.
   - **Excel** outputs the report in Microsoft Excel format. You will be prompted to open the report directly in Excel, or save it as a file.
   - **Word** outputs the report in Microsoft Word format. You will be prompted to open the report directly in Word, or save it as a file.
   - **Create Acknowledgements/Receipts** automatically creates a data file to be merged into your acknowledgement letters. See "Generating an Acknowledgement/Receipts Data File" below for details.
   - **Download Accounting Data**: This button is used with the DonorPerfect Online Accounting Module. Clicking the button transfers the current batch of accounting data to your accounting software. See "DPO Accounting Module (Manual Download)" page 429 for details.

Note: This is a drillable report. This means that clicking on any of the blue hyperlinked numbers will send you to another page that has an explanation and breakdown of that figure.

8. Performing Tasks

The menu options in the Tasks menu allow you to carry out the following basic tasks:

- Batch Entry 1.0 (see page 269)
- Batch Entry 2.0 (see page 276)
- EFT Transactions (see page 293)
- Moves Management (see page 294)
- Pledge Reminders (see page 302)

Batch Entry 1.0

Batch Entry 1.0 allows you to enter an entire group of gifts or pledges at the same time.

To access the screen, from the navigation bar, click on **Tasks**, and then click on **Batch Entry 1.0**.

Batch Entry 1.0 was designed for two purposes:

1. To speed up data entry.
2. To create an audit trail for tracking donations and preventing data entry errors.

The Batch Module allows you to enter sets of donations quickly and accurately from a single screen. It also helps protect you from making data entry errors because it will not let you post the batch of donations to the permanent gift file until everything is in order.

What is a Batch, and How Do You Enter It?

A batch is a set of donations that are entered together as a group. Usually, you can think of a batch as all of the donations that make up one bank deposit. Entering the donations in a batch helps to ensure that the same amount of money is posted to DonorPerfect as you deposit in the bank.

A batch is made up of two parts, a batch header and batch detail. First you enter the batch header, which tells the system how much money is in the batch or deposit. Then you enter the batch detail, which is the individual donations that make up the batch.

Once the batch has been entered, you then verify the batch to ensure that it is in balance. A batch is in balance when the total number and dollar amounts in the header match the total number and dollar amounts in the detail.

Once the batch has been verified, you can then post it to the system. Posting a batch creates gift or pledge entries for each of the entries in the batch.

Editing Batches

The Batch Entry screen also allows you to edit existing batches, as long as they have not yet been posted to the system. Once a batch has been posted, you must find the individual gift or pledge entries that were created for the entries in the batch, and edit them instead.

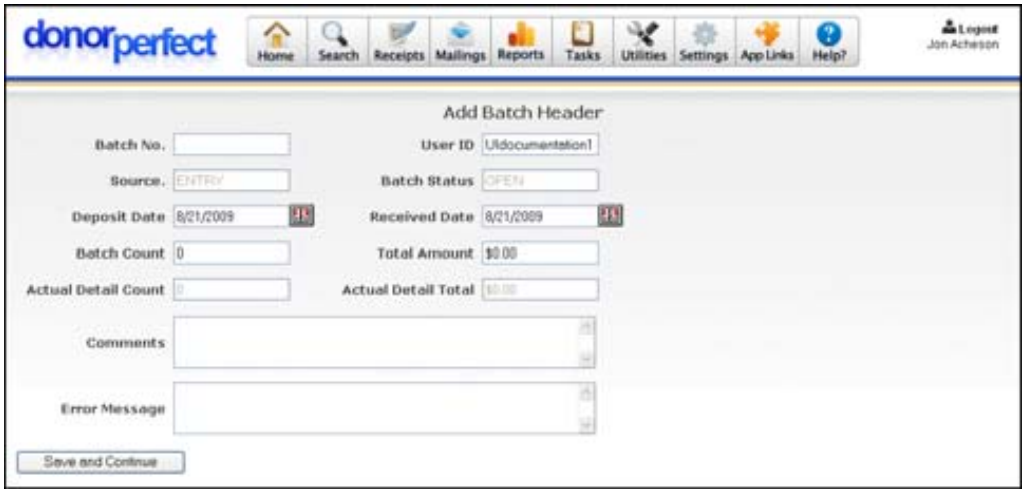
Batch Entry 1.0 Setup

In order to use Batch Entry 1.0, you must create the following user-defined fields on your Gift screen: BATCH, and PREMIUM. You must also add MCAT_EXPIRE_DATE to either the MAIN or BIO screens. See "Screen Designer" on page 393 for details on creating user-defined fields.

Adding a New Batch

▶ To add a new batch

1. From the navigation bar, select **Tasks**, and then select **Batch Entry 1.0**. The Batch Entry Screen appears.
2. Click **Add Batch**. The **Add Batch Header** screen appears.



3. Enter the following information for the batch:

Field	Description
Batch No.	The batch number field allows you to create a number for each specific batch.
Source	The source field will be filled in automatically.
Deposit Date	The deposit date field should be filled in with the date that the batch is

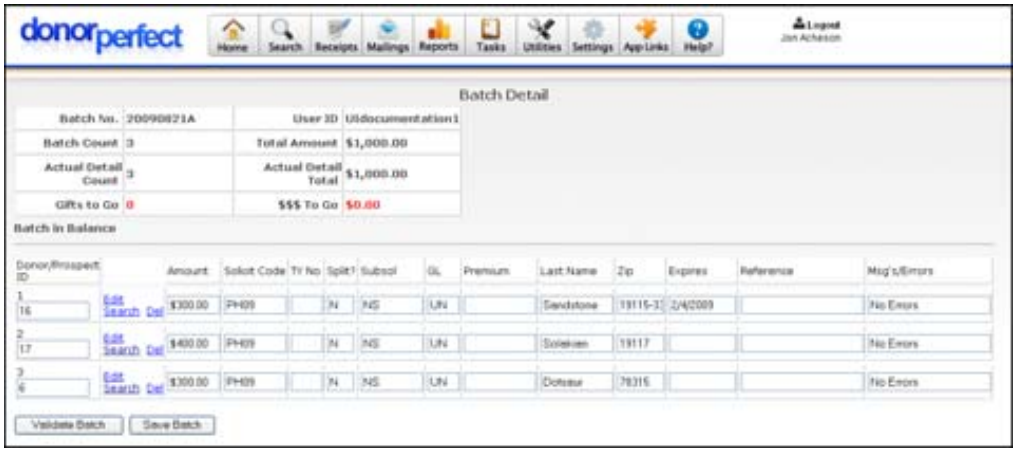
	finished and the gifts are deposited.
Batch Count	The batch count field is filled in with the number of gifts you want in the batch.
Actual Detail Count	The actual detail count field is filled in automatically with the actual number of gifts in the batch at the current time.
User ID	The user ID field is filled in with your user name.
Batch Status	The batch status field is filled in automatically depending upon the status of your batch. If the count number is not reached, the status will remain as open.
Received Date	The received date field is filled in with the date the batch is created.
Total Amount	The total amount field is filled in with the total amount of money that you want your whole batch to contain.
Actual Detail Total	The actual detail total field is filled in automatically with the total amount of money that your batch contains at the current time.
Comments	Enter any other information you wish to capture regarding this batch.
Error Message	The error message field is filled in automatically based upon any reason why your batch is not finished. If your total amount is not reached, the error message will read "Batch out of Balance." This error message will also occur if your actual detail total is greater than your set total amount.

4. Click the **Save and Continue** button. See the next section for details on entering the gifts.

Adding Gifts to a Created Batch

▶ To add gifts to a created batch

1. Once you click the **Save and Continue** button, the **Batch Detail Screen** appears.



2. For each gift to be added, you must enter in the **Donor ID**. You must also enter the amount of the gift, the **Solicit Code**, the Sub-Solicit Code (**Subsol**) and the GL Code (**GL**).

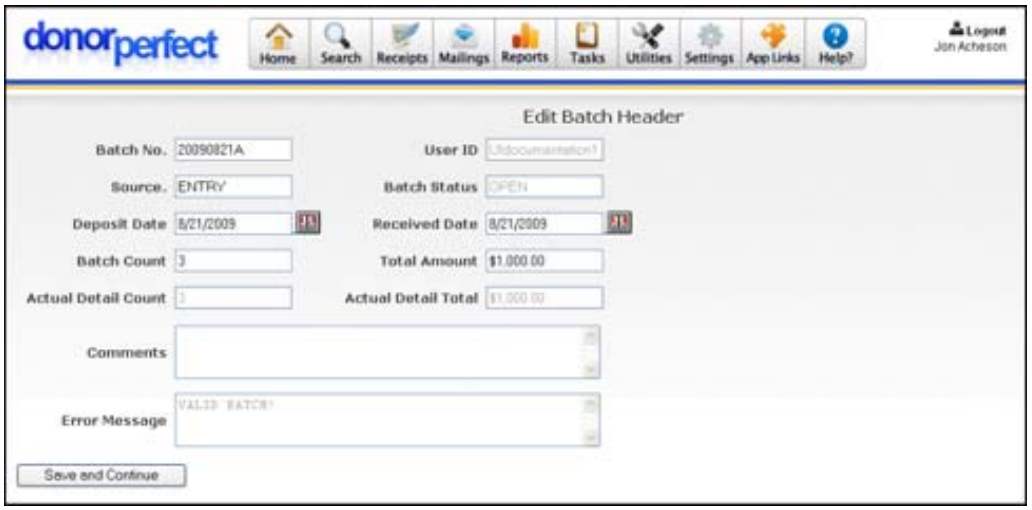
3. When you are finished entering gifts into a batch, click **Validate Batch**. Any error messages that are generated during validation will appear in the **Msg's/Errors** field.
4. Once you are finished updating your batch at the current time, click **Save Batch**, which will return you to the Initial Batch Entry Screen.

Editing an Existing Batch

▶ To edit an existing batch

1. From the **Initial Batch Entry Screen**, click on **Edit** next to the specific batch that you want to edit.

   The **Edit Batch Header Screen** appears:



2. Edit any necessary field(s) on the **Edit Batch Screen** and click **Save and Continue**. This will bring you to the **Batch Detail Screen**. Edit any necessary gifts and click **Validate Batch** if any changes were made.
3. Then, click **Save Batch** to take you back to the **Initial Batch Entry Screen**.

Deleting a Batch

▶ To delete a batch

1. From the Batch Entry Screen, click on **Delete** next to the specific batch that you want to delete. You will be prompted with the following inquiry: **Are you sure you want to delete this record?**
2. Click **OK** to confirm.

Posting a Batch

Once you have entered a batch into the system, and it has passed validation, the final step is to post the batch. This causes the gifts or pledges in the batch to actually be added to the system.

▶ To post a batch

1. From the Batch Entry Screen, click on the **Post** link next to the batch that you want to post to the system. The post will disappear from view unless the **Include Posted Batches** option is checked.

If there are errors that prevent the batch from being posted to the system, the batch entry will remain visible, and error text will appear in red. Correct the errors then post the batch again.

Frequently Asked Questions

Can I Enter More Than One Batch Before I Post?

You can enter as many batches as you want before you post. When you post, the system will validate each batch and only allow those batches that are valid to be posted. The invalid batches are left behind in the Batch Entry screen so that you can correct the errors and re-post them.

What Happens When I Post a Batch?

If you post a valid batch, the system will go through the following procedure to update donor records:

- Each prospect that donated a gift in the batch is added to the donor file, and assigned a new permanent donor ID number.
- The solicitation summary file is updated. Specifically, the program locates the gift's solicitation code in the solicitation summary file and then adds the amount of the gift to the solicitation summary.
- The GL summary file is updated. Specifically, the program locates the gift's GL code and date in the GL summary file and then adds the amount of the gift to the GL summary. (This step is optional.)
- Each gift in the batch is added to the permanent gift file.
- Year-to-date totals are re-calculated to reflect the gifts from the batch.

Problems Posting a Batch

Sometimes, when you attempt to post a batch, the system will refuse to post the batch because it has detected one or more problems. The system produces an error report, detailing each problem that needs to be addressed before re-posting the batch.

Any one of the following problems will prevent a batch from being posted:

The total number of gifts in the batch does not equal the total number of gifts in the header.

Either the batch header is wrong, or the batch detail is wrong. Re-count the return slips or the checks.

If the batch header is correct, then you have either accidentally entered a donation twice, or you skipped a donation. You will have to edit the batch to

delete the duplicated donation, or add the skipped donation to bring the batch into balance.

The total dollar amount of gifts in the batch does not equal the total dollar amount of gifts in the header.

Either the batch header is wrong, or the batch detail is wrong. Re-total the dollar amounts on the checks.

If the batch header is correct, then you have either entered an incorrect amount, entered a donation twice, or you skipped a donation. You will have to edit the batch to delete the duplicated donation, or add the skipped donation to bring the batch into balance.

If the batch header is wrong, then you need to edit the batch header to bring the batch into balance.

The batch number has already been used.

Select **Batch Entry**. Click **Edit** for the batch that you need to change. Enter a new, un-used batch number. Click **Save and Continue**.

The data-entry person's User ID was incorrect.

Select **Batch Entry**. Click **Edit** for the batch that you need to change. Correct your User ID. Click **Save and Continue**.

The batch does not contain any donations.

You entered a batch header, but never actually entered the gifts that belong to the batch. You need to enter the gifts.

Select **Batch Entry**. Click the **Edit** button. Click **Save and Continue**. Enter the donations as usual.

The deposit date on the batch is too old.

Typically, the system is setup to prevent you from entering donations that are older than 180 days. If you need to post a batch that is older than 180 days, then you must adjust the Batch Module setting for back posting.

At least one gift was not assigned a valid solicitation code.

Either you entered an invalid solicitation code, or the code that you entered is valid but has not been added to your code file.

If the solicitation code is invalid, then you simply need to edit the batch to change the solicitation code. Select **Batch Entry**. Click **Edit** for the affected batch. Click the **Save and Continue** button. Scroll down to the gift that has the invalid code and enter the valid solicitation code. Click **Validate Batch**. Click **Save Batch**.

If the solicitation code is valid, then you need to add the solicitation code to your permanent code file. Select **Settings** then **Code Maintenance**. Click **Add**. Select **Solicitation Code** from the pull-down menu. Enter the new, valid solicitation code as well as the description. Click **Save**.

At least one gift was not assigned a valid GL code.

Either you entered an invalid GL code, or the code that you entered is valid, but has not been added to your code file.

If the GL code is invalid, then you simply need to edit the batch to change the solicitation code. Select **Batch Entry**. Click **Edit** for the affected batch. Click **Save and Continue**. Scroll down to the gift that has the invalid code and enter the valid GL code. Click **Validate Batch**. Click **Save Batch**.

If the GL code is valid, then you need to add the GL code to your permanent code file. Select **Settings** then **Code Maintenance**. Click **Add**. Select **GL Code** from the pull-down menu. Enter the new, valid GL code as well as the description. Click **Save**.

At least one gift has an invalid donor ID.

The donor ID that you entered does not belong to a donor. Usually this means that you entered the wrong ID number. To enter the correct donor ID number, first locate the donor by using their last name and then write down the correct donor ID number. Select **Batch Entry**. Click **Edit**. Click **Save and Continue**. Scroll down to the donation with the invalid ID number. Enter the correct donor ID number. Click the **Validate Batch** button. Click **Save Batch**.

Batch Entry 2.0

Batch Entry 2.0 is an advanced version of Batch Entry 1.0 that offers more flexibility to the user, but is somewhat more complex in its operation. It is intended as an alternative for power users who need its features.

Batch Entry 2.0 is intended to allow the user to enter gifts and pledges in batches, so as to speed up data entry, reduce data entry errors, and provide a way of reviewing batches of gifts and pledges for correctness before they are posted to the system.

Batch Entry 2.0 makes extensive use of templates to allow you to tailor your data entry screens for efficiency. In addition, Batch Entry 2.0 line items may contain split gifts, tributes, notifications, matching gifts, applications toward pledges, and soft credits.

Batch Entry 2.0 is an additional module: contact your sales representative to enable this module on your system.

To access the Batch Entry 2.0 module, from the navigation bar, select **Tasks**, then **Batch Entry 2.0**.

Batch Entry 2.0 Workflow

The workflow for using the Batch Entry 2.0 module is as follows:

1. Configure User Security Settings for Batch Entry 2.0
2. Create templates – These allow you to enter a lot of default information with a single selection.

   For instance, you can create a gift template that allows you to enter all of the gifts associated with a solicitation, and it can automatically fill in the solicitation and GL codes for each gift, with no work or chance for error.
3. Create the Batch
   a. Create batch header & select templates
   b. Enter individual batch entries
4. Review Batch
5. Post the batch to the System.

Batch Entry 2.0 Setup

Setting Up User-Defined Fields for Batch Entry 2.0

In order to use Batch Entry 2.0, you must add the **BATCH** user-defined fields to your Gift screen. See "Screen Designer" on page 393 for details on creating user-defined fields.

Configuring Security Settings for Batch Entry 2.0

Access to the Batch Entry 2.0 module is controlled by security settings that can be set for each user account. These settings allow users to edit, delete and post batches.

▶ To set Batch Entry 2.0 security settings

1. From the navigation bar, select **Settings** and then select **User Security**.
2. Click on the **Edit** link next to the user account name.
3. In the **Tasks** section, set the following options for **Batch Entry 2.0**:

Setting	Description
Edit	If checked, the user can create and edit batches.
Delete	If checked, the user can delete a batch.
Post	If checked, the user can post batches to the system.

4. Click the **Save** button to save your changes.

Setup for Independent Use of Batch Entry 2.0

To set up a user account for a user who operates without direct supervision of each batch entry, check the **Edit**, **Delete** and **Post** boxes for the user.

Setup for Use of Batch Entry 2.0 with Executive Oversight

To set up a situation where a number of low-level users enter data in batches, which are then reviewed and posted by a supervisor, you would set the Batch Entry 2.0 security settings as follows:

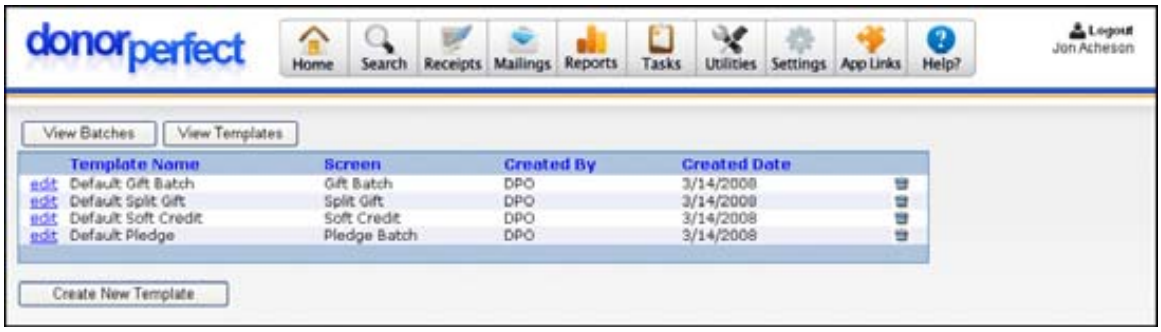
Role	Description	Edit	Delete	Post
Data Entry Employee	Entry-level user who can enter and edit batches, but cannot post them to the system (the Supervisor does that).	X		
Supervisor	The supervisor is an experienced employee who reviews the work of the data entry employees, corrects them, and then posts the batches to the system.	X	X	X

Setting Up Batch Entry Templates

Batch Entry 2.0 templates allow you to store a number of settings related to a type of gift, split gift, soft credit or pledge. You can then reapply all of the settings entered in the template, simply by selecting the template when you create a new batch entry. This speeds up data entry and helps eliminate errors.

Viewing the Existing Templates

To view the templates that have already been created, click the **View Templates** button in the Batch Entry 2.0 screen. The templates created for the system will be listed.



Creating Templates

▶ To create a Batch Entry 2.0 template

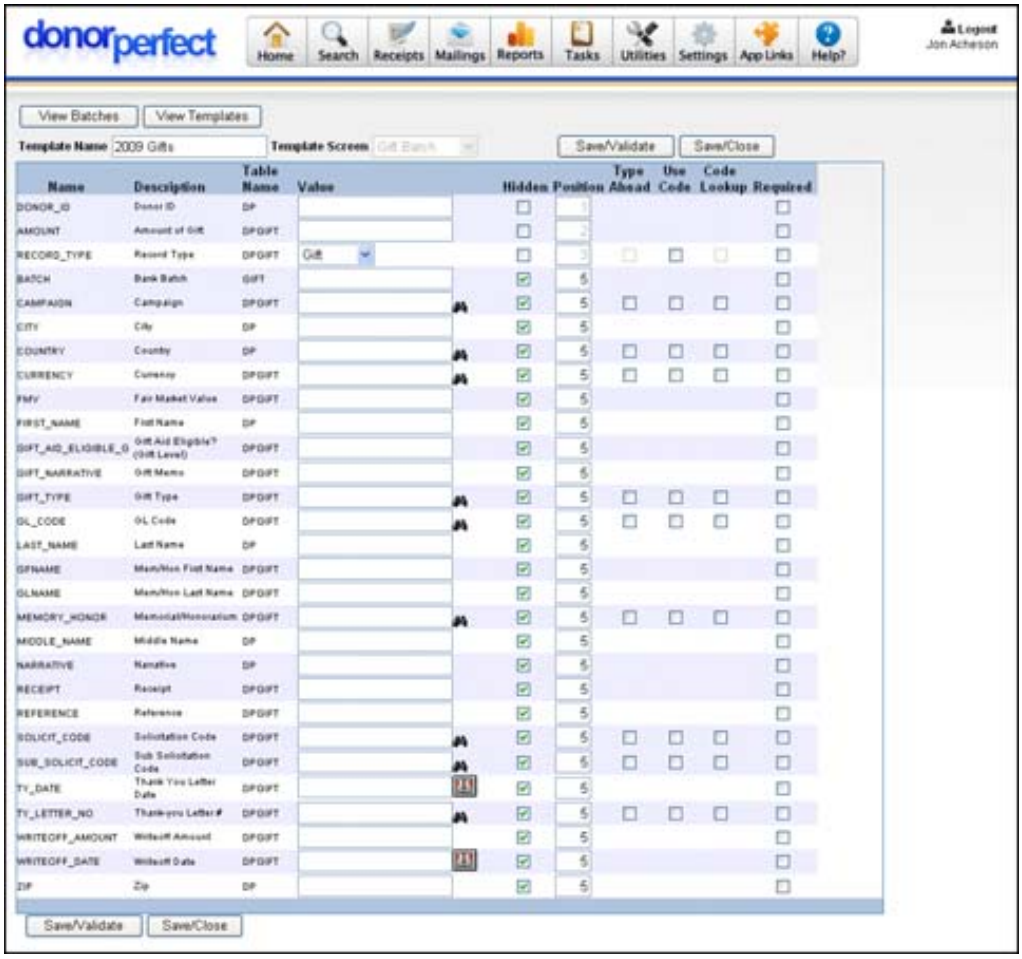
1. In the Batch Entry 2.0 screen, click the **View Templates** button.
2. Click the **Create New Template** button.

3. Enter a **Template Name**.
4. Set **Template Screen** to the type of template you want to create:

Type	Description
Gift Batch	A template that can be applied to basic gifts.
Soft Credit	A template for soft credits.
Split Gift	A template for split gifts.
Pledge Batch	A template for adding batches of pledges.

5. Click **Continue**.

6. Check the users who you want to be able to use the new template. Click the **select all** link to check all users. Click the **select none** link to uncheck all users.
7. Click the **Continue** button.



8. Enter the values or settings that you want to be automatically entered when the template is selected. The fields present will vary depending on the type of template you are creating.
9. Click the **Save/Close** button. You will be returned to the list of templates, and your new template will be present.

Editing Templates

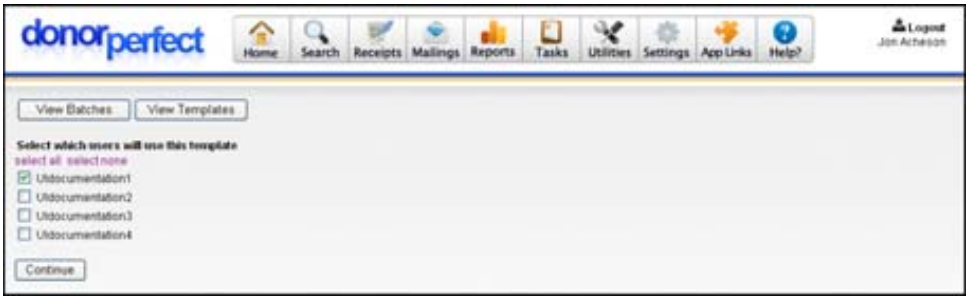
When editing templates, you have the option of either editing the users who can use the template, or go straight to the values and settings contained in the template.

▶ To edit a template

1. From the Batch Entry 2.0 screen, click the **View Templates** button.
2. In the list of templates, click on the **edit** link next to the template you want to edit. The Batch Edit screen appears.

3. To edit the users who can see and use a template:

   a. Select Add/Remove Template Users and click the **Continue** button.

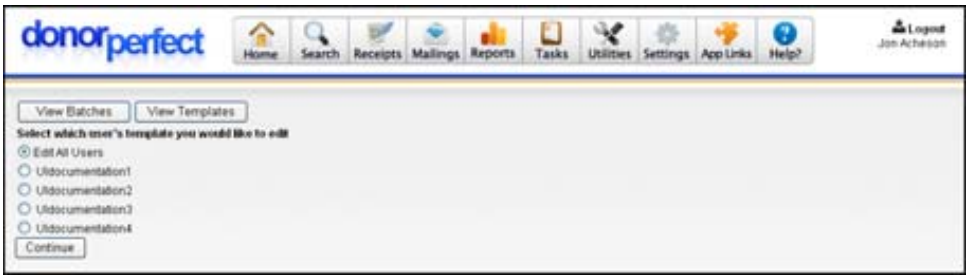


   b. Check the users who you want to be able to use the new template. Click the **select all** link to check all users. Click the **select none** link to uncheck all users.

   c. Click the **Continue** button. You will be returned to the Batch Edit screen.

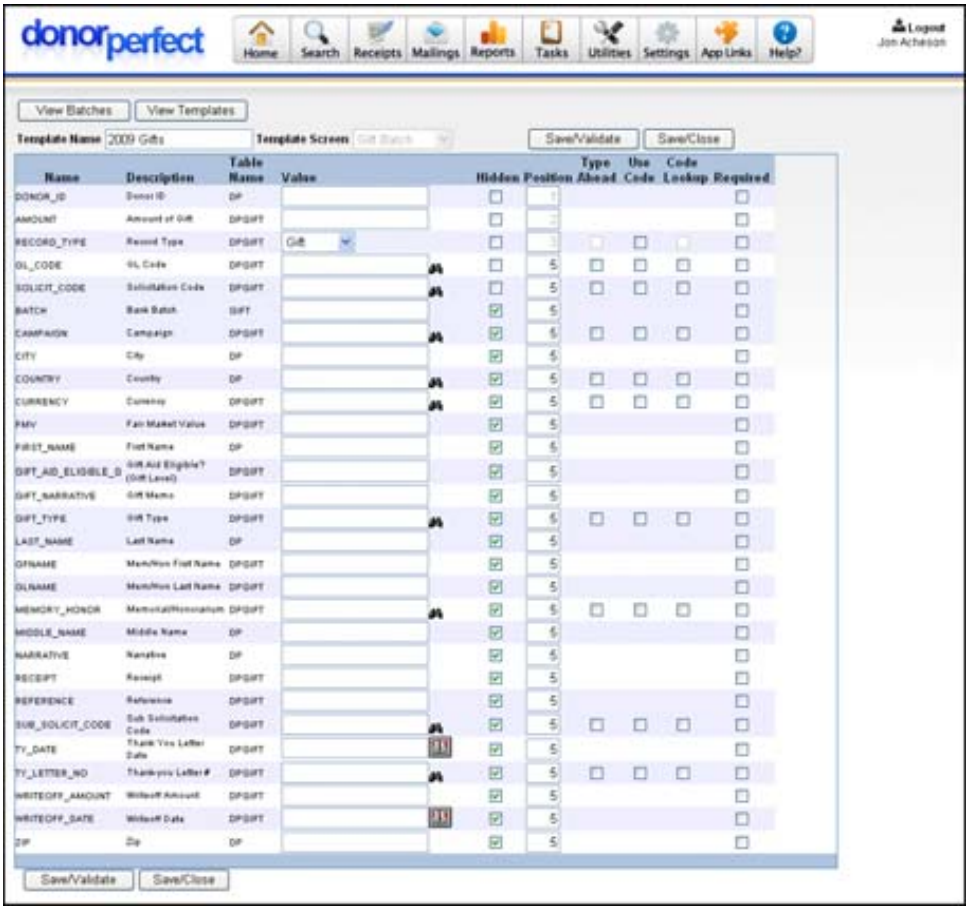
4. To edit the values and settings contained in the template:

   a. Select **Edit Template Contents** and click the **Continue** button.



   b. Select either an individual user, or select **Edit All Users** to edit the values and settings for all users.

   c. Click the **Continue** button.

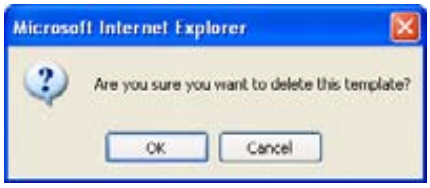


d. Edit the values/settings for the template, then click on the **Save/Close** button. You will be returned to the list of templates.

Deleting Templates

▶ To delete a template

1. From the Batch Entry 2.0 screen, click the **View Templates** button.
2. In the list of templates, click on the ✗ link to the right of the template you want to delete.



3. Click **OK** to delete the template, or **Cancel** to cancel.

Creating a Batch

There are two steps to creating a batch:

1. Creating the batch header

2. Adding batch entries

▶ To create a new batch

1. In the Batch Entry 2.0 screen, click the **View Batches** button.
2. Click on one of the following buttons:
   - Click **Create New Gift Batch** to create a batch of gift entries.
   - Click **Create New Pledge Batch** to create a batch of pledge entries.

3. Enter the header information for the batch:
   a. For a Gift Batch, the fields are as follows:

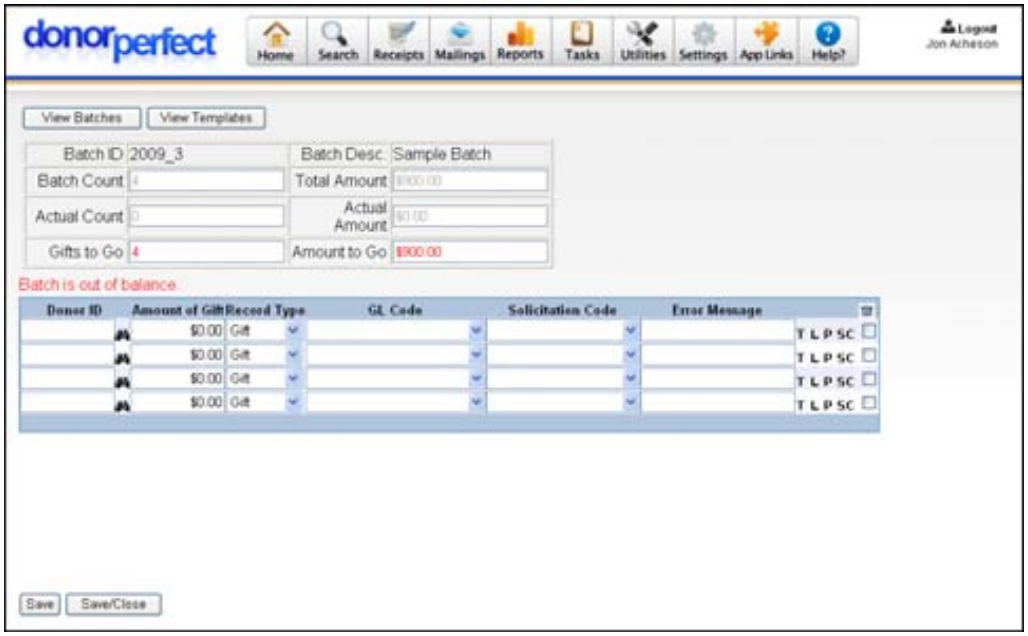
Batch ID/Batch Status	The system will generate a unique ID number for the batch, and track the batch status. These fields are not editable.
Batch Description	A brief (15 character) description of the contents of the batch.
Batch Count	The number of gifts in the batch.
Actual Count	The actual number of entries in the batch as tracked by the system. This field is not editable.
Date of Gifts	The date on which the gifts were received. This date will be entered as the Gift Date for each of the gifts in the batch.
Total Amount	The estimated total value of the gifts in the batch.
Actual Amount	The actual total value of the gifts in the batch as tracked by the system. This field is not editable.
Template	Select the Gift template you want to apply, if any.
Split Gift Template	Select the split gift template you want to apply, if any.
Soft Credit Template	Select the soft credit template you want to apply, if any.
Error Message	If an error is discovered during the processing of the batch, it will be listed here. This field is not editable.

b. For a Pledge Batch, the fields are:

Batch ID/Batch Status	The system will generate a unique ID number for the batch, and track the batch status. These fields are not editable.
Batch Description	A brief (15 character) description of the contents of the batch.
Batch Count	The number of pledges in the batch.
Actual Count	The actual number of entries in the batch as tracked by the system. This field is not editable.
Date of Pledges	The date on which the pledges were received. This date will be entered as the Pledge Date for each of the pledges in the batch.
Total Amount	The estimated total value of the pledges in the batch.
Actual Amount	The actual total value of the pledges in the batch as tracked by the system. This field is not editable.
Template	Select the Pledge template you want to apply, if any.
Error Message	If an error is discovered during the processing of the batch, it will be listed here. This field is not editable.

c. Click the **Save and Continue** button.

4. Enter the gift or pledge entries for the batch:



a. For each gift entry, fill in the data fields:

Field	Description
Donor ID	The Donor ID number of the donor giving the gift. Click the binoculars icon (🔭) to search for the Donor ID.
Amount of Gift	The monetary value of the gift.

Field	Description
Record Type	Choose **Gift** or **Split Gift**. If **Split Gift** is selected, a new window will open up in which you can enter the split values. See "Entering Split Gifts into a Batch," page 285 for details. See "Editing Codes for Coded Fields in Batch Entry 2.0" on page 301 for details on adding codes to this field.
Gift Type	Choose the type of payment for the gift: Cash, check , credit card, etc. See "Editing Codes for Coded Fields in Batch Entry 2.0" on page 301 for details on adding codes to this field.
Campaign	Choose the campaign associated with the gift, if any. See "Editing Codes for Coded Fields in Batch Entry 2.0" on page 301 for details on adding codes to this field.
GL Code	The General Ledger code associated with the gift. Click the binoculars icon (🔭) to search for the code. See "Editing Codes for Coded Fields in Batch Entry 2.0" on page 301 for details on adding codes to this field.
Solicitation Code	The code for the solicitation that this gift was given in response to. Click the binoculars icon (🔭) to search for the code. See "Editing Codes for Coded Fields in Batch Entry 2.0" on page 301 for details on adding codes to this field.
Thank-you Letter #	The code for the type of thank-you letter to be sent in response to the gift. Click the binoculars icon (🔭) to search for the code See "Editing Codes for Coded Fields in Batch Entry 2.0" on page 301 for details on adding codes to this field..
Error Message	If there is a problem with the gift entry, an error message will appear in this field. This field is not editable by the user.
T	Click on this letter to apply the gifts in this batch entry towards a tribute. See "Applying a Gift Entry to a Tribute" page 286 for details.
L	Click on this letter to link this batch entry to a name. See "Linking a Name to a Batch Entry" page 287 for details.
P	Click on this letter to apply this batch entry towards a pledge. See "Applying a Batch Entry to a Pledge" page 289 for details.
SC	Click on this letter to add a soft credit to a batch entry. See "Adding a Soft Credit to a Batch Entry" page for details.

Note: The exact fields that appear in the screen are determined by the gift template that was chosen in the first Batch Entry screen. For details on all fields, see the "Gift Entry" section on page 44.

b. For each pledge entry, fill in the following fields:

Field	Description
Donor ID	The Donor ID number of the donor making the pledge. Click the binoculars icon (🔭) to search for the Donor ID.

Field	Description
Total (Pledge)	The total amount pledged.
Start Date (Billing)	The date on which pledge payments are scheduled to begin.
Frequency (Billing)	Select the frequency with which pledge payments are scheduled to be made.
Bill Amount	The amount to be billed for each pledge payment.
GL Code	The General Ledger code associated with the pledge. Click the binoculars icon (🔭) to search for the code. See "Editing Codes for Coded Fields in Batch Entry 2.0" on page 301 for details on adding codes to this field.
Solicitation Code	The code for the solicitation that this pledge was responding to. Click the binoculars icon (🔭) to search for the code. See "Editing Codes for Coded Fields in Batch Entry 2.0" on page 301 for details on adding codes to this field.
Thank-you Letter #	The code for the type of thank-you letter to be sent in response to the pledge. Click the binoculars icon (🔭) to search for the code. See "Editing Codes for Coded Fields in Batch Entry 2.0" on page 301 for details on adding codes to this field.
Error Message	If there is a problem with the gift entry, an error message will appear in this field. This field is not editable by the user.

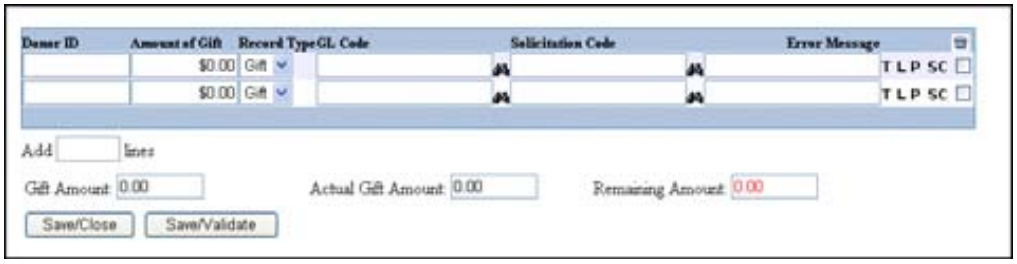
Note: The exact fields that appear in the screen are determined by the pledge template that was chosen in the first Batch Entry screen. For details on all fields, see the "Pledge Entries" section on page 59.

5. Once all of the batch entries have been entered, click the **Save/Close** button to save the changes and return to the Batch Entry 2.0 screen.

Entering Split Gifts into a Gift Entry

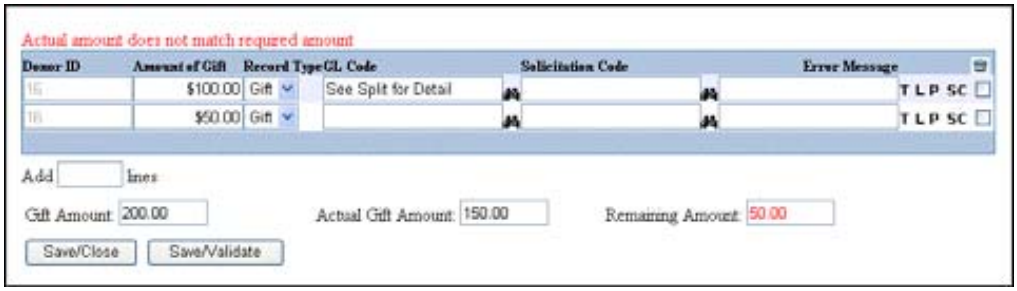
▶ To enter a split gift into a batch entry

1. In the second Batch Entry screen, select a Donor ID and Amount of Gift for a new gift record.
2. Set **Record Type** to **Split Gift**. The Split Gifts screen will appear in a separate window.



3. Enter the amounts for each of the new split gifts, along with the GL Code and other information. As you add gifts, the value in the **Remaining** field will be updated to reflect the amounts of the gifts.
4. To add more splits:
   a. Enter the number of splits you want to add in the **Add ___ lines** field.
   b. Either press the **ENTER** key on your keyboard, or tab over to another field.

   The new lines will appear at the bottom of the list of split gifts.
5. Once all split gifts have been added, click the **Validate** button to check that all gift entries are valid, and that they add up to the amount of the gift entry on the main screen. If there is a problem with the entries, it will appear in red text:



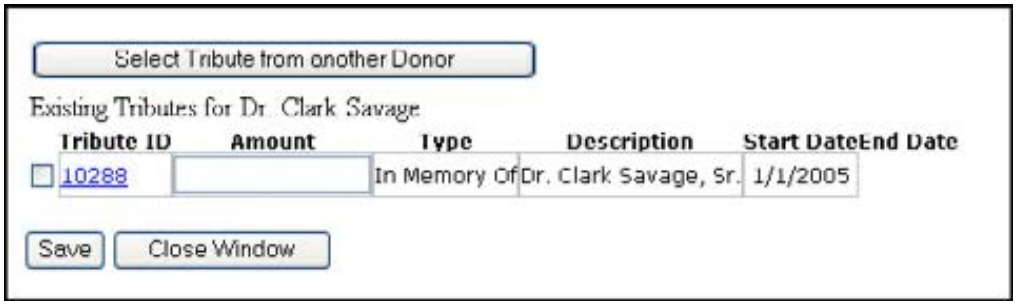
6. Once all split gifts have been added and validated, click the **Complete** button to save the split gift entries and return to the Batch Entry screen.

Applying a Gift Entry to a Tribute

The T link found at the right end of each gift entry line allows you to apply a gift entry towards a tribute that has already been entered into the system. You can also remove tributes using the same link.

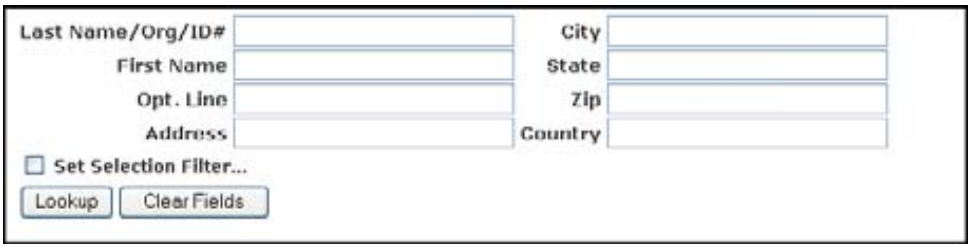
▶ To apply a batch entry towards a tribute

1. On the second batch entry screen, click the **T** link located at the right end of the gift entry line you want to apply towards a tribute. The tribute screen will open in a separate window.

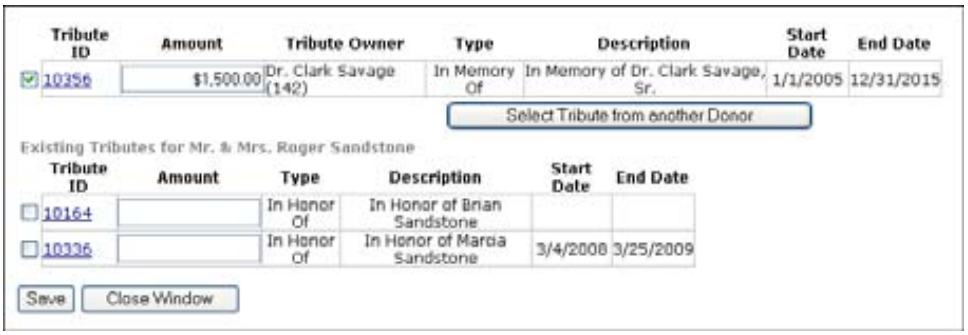


2. Check the tribute that you would like to apply the gift towards, and enter the amount of the tribute in the **Amount** field.
3. To select a tribute from another donor:

a. Click the **Select Tribute from another Donor** button. A search screen appears in a new window:



b. Search for and select the donor whose tribute you want to apply the gift towards. The search screen works like the Search Screen in the Entry Screens (see "Searching for Donor Records" page 27 for details). Once selected, that donor's tributes will appear in the tribute screen, and can be selected in the same way as any other tribute.



4. Once you have selected the tributes you want to apply, click the **Save** button to save the tribute information.
5. Click the **Close Window** button to return to the second batch entry screen.

Removing Tributes from a Gift Entry

▶ To remove tributes from a gift entry

1. On the second batch entry screen, click the **T** link located at the right end of the gift entry line.
2. In the tribute screen, clear out the checkboxes for the tributes you want to remove.
3. Click the **Save** button to save your changes. The unchecked tributes are deleted.
4. Click the **Close Window** button to return to the second batch entry screen.

Linking a Name to a Batch Entry

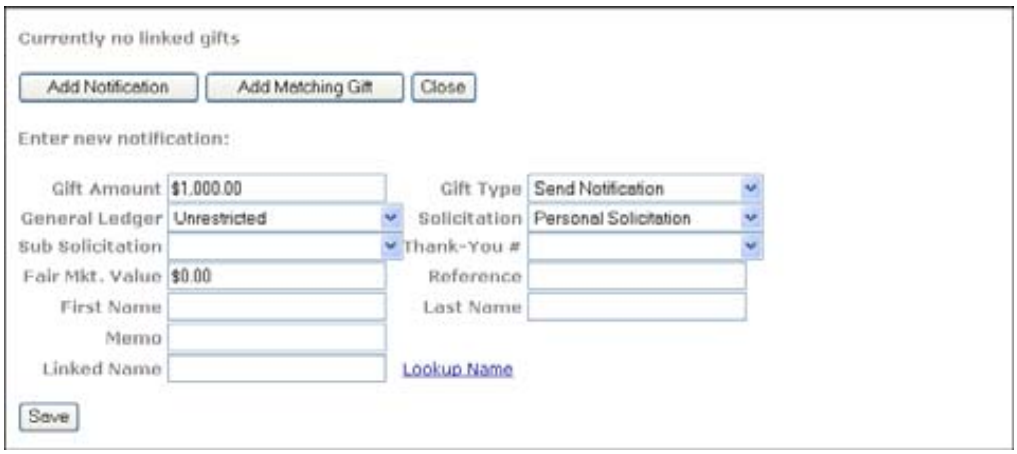
Linking a name to a gift or pledge entry allows you to add either a notification or a matching gift to the batch entry.

▶ To add a notification or matching gift to a batch entry

1. On the second batch entry screen, click the **L** link located at the right end of the batch entry line. The Linked Name screen opens in a new window.

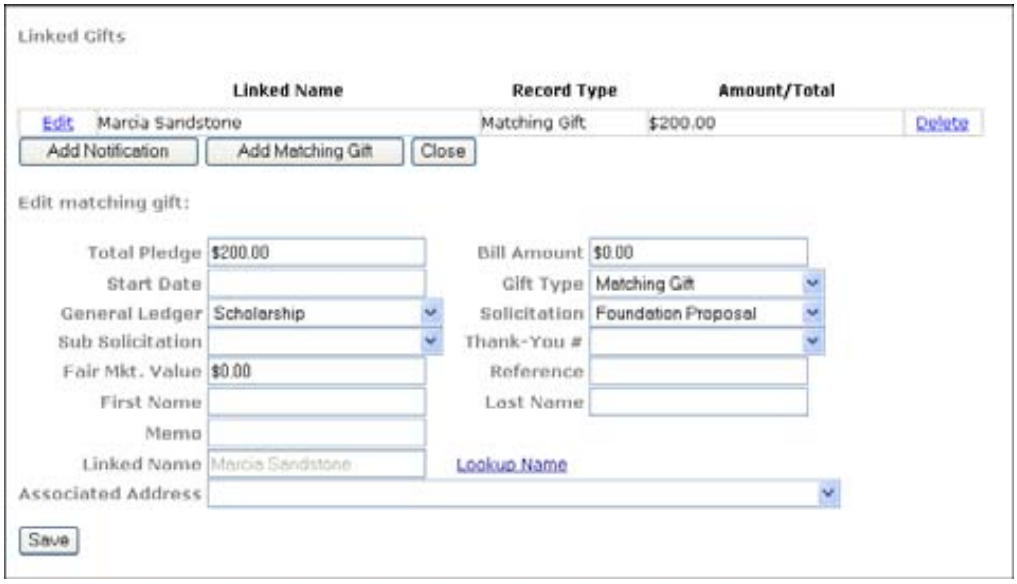
- Click the **Add Notification** button to add a notification.
- Click the **Add Matching Gift** button to add a matching gift.

A new set of fields appear at the bottom of the screen.



2. If desired, you can enter information into the various fields. They are identical to the fields in the regular gift entry screen. See "Gift Entry" page 44 for details.
3. Click the **Lookup Name** link next to the **Linked Name** field. The Lookup Name screen opens.

4. Search for and select the donor record that you want to either notify or create a matching gift for. The search screen works like the Search Screen in the Entry Screens (see "Searching for Donor Records" page 27 for details). Once you select the donor, a record will appear at the top of the Linked Name screen for the notification or matching gift.



5. Continue to add notifications or matching gifts as needed.
6. To edit a notification or matching gift, click the **Edit** link to the left of the record at the top of the screen.
7. To delete a notification or matching gift, click the **Delete** link to the right of the record at the top of the screen.
8. When finished, click the **Close** button to close the Linked Name screen and return to the second Batch Entry screen.

Applying a Gift Entry to a Pledge

You can apply a gift entry towards a previously created pledge in the system.

▶ To apply a batch entry to a pledge

1. On the second batch entry screen, click the **P** link located at the right end of the batch entry line. The Linked Name screen opens in a new window.

2. Select the pledge that you would like to apply the gift towards.
3. To select a pledge from another donor:
   a. Click the **Select Pledge from another Donor** link. A search screen appears in a new window:

b. Search for and select the donor with the pledge you want to apply the gift towards. The search screen works like the Search Screen in the Entry Screens (see "Searching for Donor Records" page 27 for details). Once selected, that donor's pledges will replace the ones for the donor of the gift, and can be selected instead.

4. Once you have selected a pledge, click the **Apply to Pledge** button to apply the gift towards the pledge.

5. Click the **Close** link to close the Pledge screen and return to the second Batch Entry screen.

Removing a Pledge from a Gift Entry

▶ To remove a pledge from a gift entry

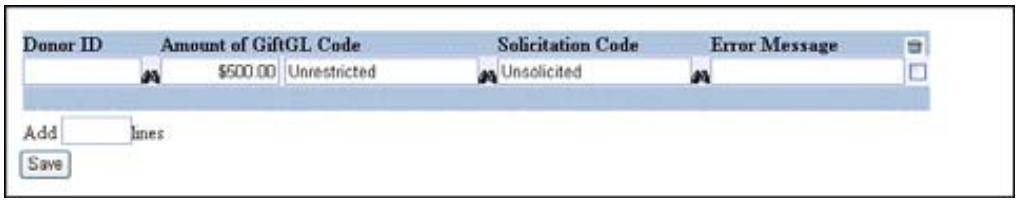
1. On the second batch entry screen, click the **P** link located at the right end of the gift entry line.
2. In the pledge screen, click the **Remove from Pledge** button.
3. Click the **Close** link to close the Pledge screen and return to the second Batch Entry screen.

Adding a Soft Credit to a Gift Entry

You can give another donor a soft credit for a batch entry, to recognize their role in bringing in the donation.

▶ To add a soft credit to a pledge

1. On the second batch entry screen, click the **SC** link located at the right end of the batch entry line. The Soft Credit screen opens in a new window.



2. Enter the **Donor ID** for the soft credit, or click the binoculars icon (🔭) to search for the **Donor ID**.
3. Enter the amounts for each of the soft credits, along with the GL Code and other information.
4. To add more soft credits:
   a. Enter the number of soft credits you want to add in the **Add ___ lines** field.
   b. Either press the **ENTER** key on your keyboard, or tab over to another field.

   The new lines will appear at the bottom of the list of soft credits.
5. Once you have entered all of the soft credits for the gift, click the **Save** button to close the Soft Credit screen and save the soft credit information.

> Note: The exact fields that appear in the screen are determined by the Soft Credit template that was chosen in the first Batch Entry screen. For details on all fields, see the "Linking a Name to a Gift" section on page 52.

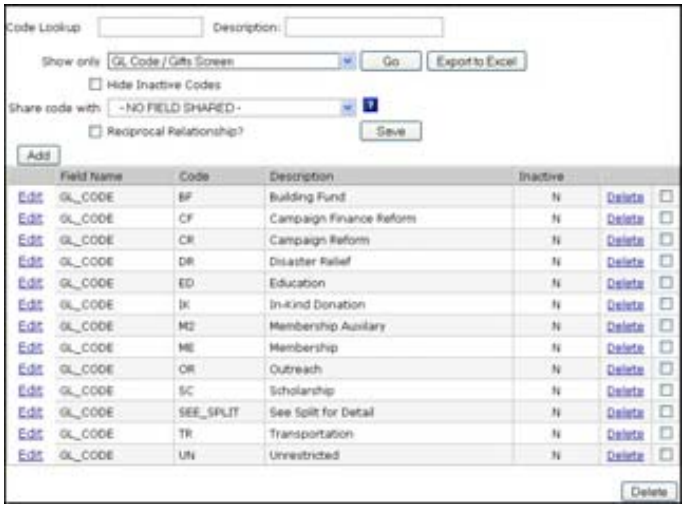
Editing Codes for Coded Fields in Batch Entry 2.0

Batch Entry 2.0 now allows users to edit codes for coded fields while entering batch records.

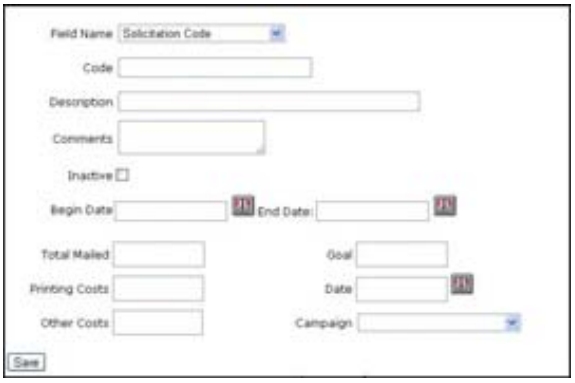
▶ To edit codes for a coded field in Batch Entry 2.0

1. On the second batch entry screen, mouse over the column headings to determine which of the fields are coded fields. For the coded fields, the column headings are links, and you will see a pointer finger instead of a regular cursor arrow when you mouse over them.

2. To edit codes for a coded field, double-click on the column header for that field. A popup screen will appear that lists all the codes for that field:



3. To add a code:
   a. Click the **Add** button. A new form appears:



   b. Enter the following information for the code:

Setting	Description
Field Name	Choose the code type from the pull-down (for example, Flag).
Code	Enter the code (for example, BD).
Description	Enter a description for the code (for example, Board Member).
Comments	Enter any comments you want to store about the code.
Inactive	Check to make the code inactive. See "Inactivating Codes" page 360 for details.
Begin Date	The date after which the code will automatically become active. If you do not enter a date, today's date is entered by default.
End Date	The date after which the code will automatically become inactive. If you do not enter a date, January 1, 2099 is entered by default.

   c. Click the **Save** button to save the code and add it to your system. You will be returned to the second Batch Entry 2.0 screen.

4. To edit a code:
   a. Click on the **Edit** link next to the code. A form opens displaying the settings for the code:

b. Edit the settings for the code.

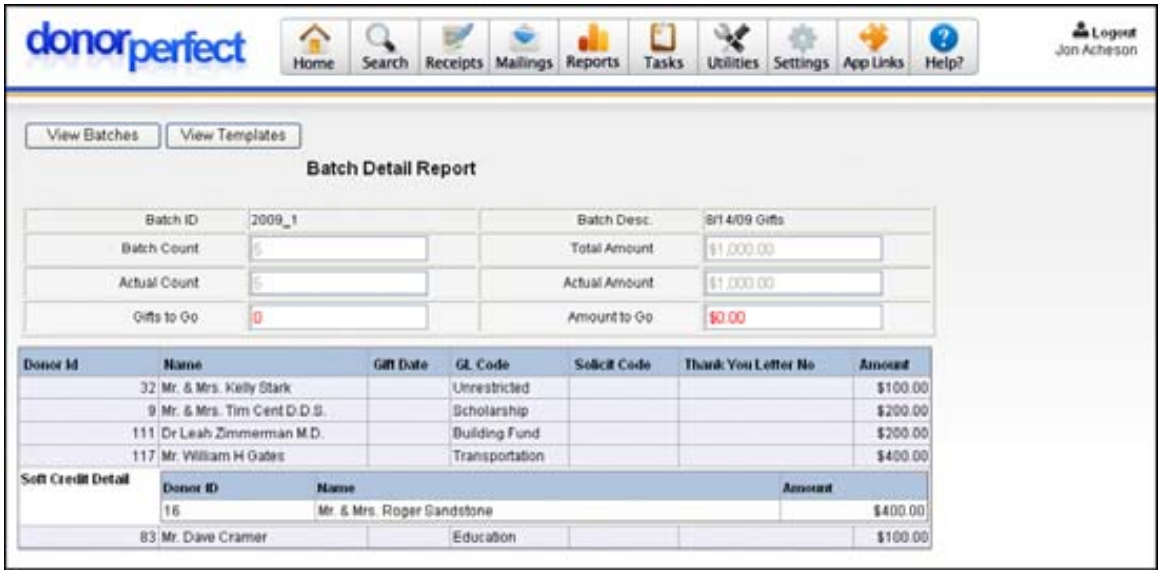
c. Click the **Save** button to save your changes. You will be returned to the second Batch Entry 2.0 screen.

5. To delete a code:

a. Click the **Delete** link next to the code. A confirmation screen appears:

b. Click OK to delete the code. You will be returned to the second Batch Entry 2.0 screen.

Verifying a Batch Using the Batch Report



The Batch Report lists the information about a batch, including the data from the batch header, and the batch entries. If the batch is not valid, the report displays the reason why.

▶ To run a batch report

1. Navigate to the main Batch Entry 2.0 screen.
2. Click the **Batch Report** link next to the batch you want to run the report on.
3. Once you are finished looking at the batch report, click the **View Batches** button to return to the main Batch Entry 2.0 screen.

Editing a Batch

You can edit a batch, and the individual entries in it, up until the point where you post it to the system.

To edit a batch, click on the Edit link next to the batch in the main Batch Entry 2.0 screen. You will go through the same steps as when you created the batch, and can change the values in the various fields.

Adding Entries to a Batch

▶ To add additional entry lines to a batch

1. If you are in the second batch entry screen, click the **Save/Close** button to return to the main Batch Entry 2.0 screen.
2. Click the **Edit** link next to the batch you want to add entries to.
3. In the first Batch Entry screen, increase the value in the **Batch Count** field by the number of entries you want to add, and update the **Total Amount** field as necessary.
4. Click the **Save and Continue** button on the first Batch Entry screen. The additional entry lines will be displayed on the second Batch Entry screen.

Deleting Entries from a Batch

▶ To delete an entry from a batch

1. In the second batch entry screen, check the box at the far right end of the batch entry line, under the 🗑 heading.
2. Click the **Save** button. The indicated entry line will be deleted, and the Batch Count will be reduced by 1.

Deleting a Batch

You can only delete an open batch. Once a batch has been posted to the system, it cannot be deleted.

▶ To delete an entire batch

1. From the main Batch Entry 2.0 screen, click on the 🗑 icon at the right end of the batch listing.

2. Click the **OK** button to delete the batch, or the **Cancel** button to cancel the deletion.

Posting a Batch

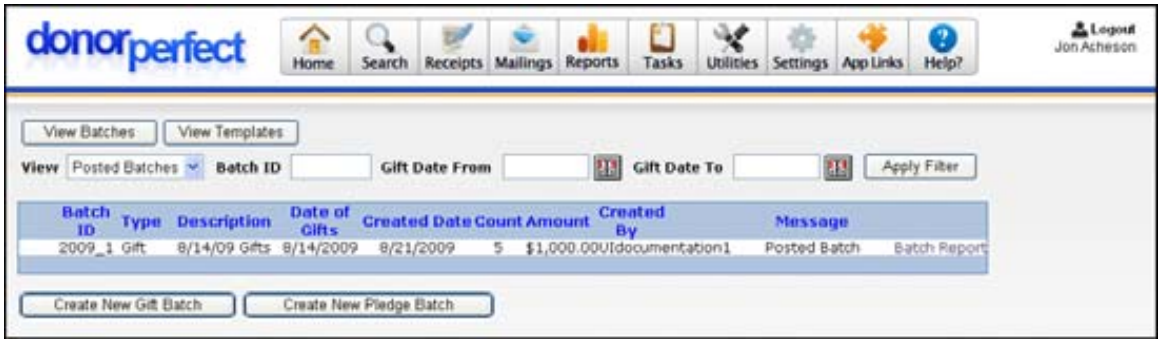
▶ To post a batch to the system

1. Check the box at the left end of the batch listing in the Batch Entry 2.0 screen.

2. The **Post Batches** button appears underneath the **Create New Batch** and **Create New Pledge Batch** buttons.

3. Click the **Post Batches** button.

Once processed, the batch is removed from the **Open Batches** view on the main Batch Entry 2.0 screen, but is still visible on the **Posted Batches** or **All Batches** views.



Note: The check boxes will not appear at the left end of the batch listings if the current user's security privileges do not allow the user to post batch files.

EFT Transactions

EFT stands for Electronic Funds Transfer. The EZ-EFT module allows centers to manage the information necessary for automatic electronic processing of preauthorized payments from donors. Payments are made by electronic funds transfer or automatic credit card drafting. Each collection cycle you can use EZ-EFT to generate and transmit transactions to the appropriate processor. Money is transferred automatically from the donor's account on the day it is due.

See the *DonorPerfect Online Payment Processing Manual* for full details on EZ-EFT.

Moves Management

The **Moves Management Module** gives you the ability to design, schedule, and carry out a set of contact "moves" for a group of donors. For example, you can create a plan to solicit donations from your major donors for your annual appeal. Each plan includes the specific set of actions (e.g., phone calls, emails, and meetings) you want to use to solicit your donors. With this module, you have the option to schedule each of these actions and assign them to different users in your system. As each action is completed, you'll be prompted to schedule the next action in the plan.

When you are creating a Moves Management Plan, there are a few different steps involved, which are detailed in this section:

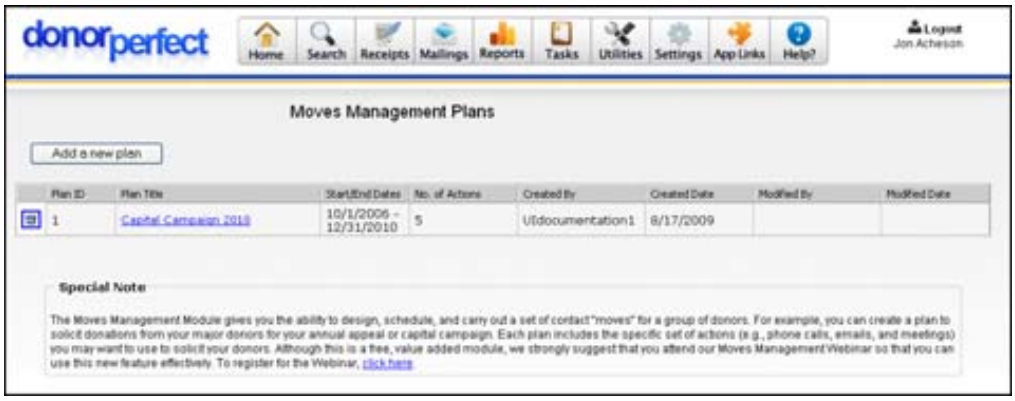
- Adding a plan
- Editing a plan
- Assigning actions to a group of donors
- Assigning actions to individual donors
- Running Moves Management Reports

Adding a Moves Management Plan

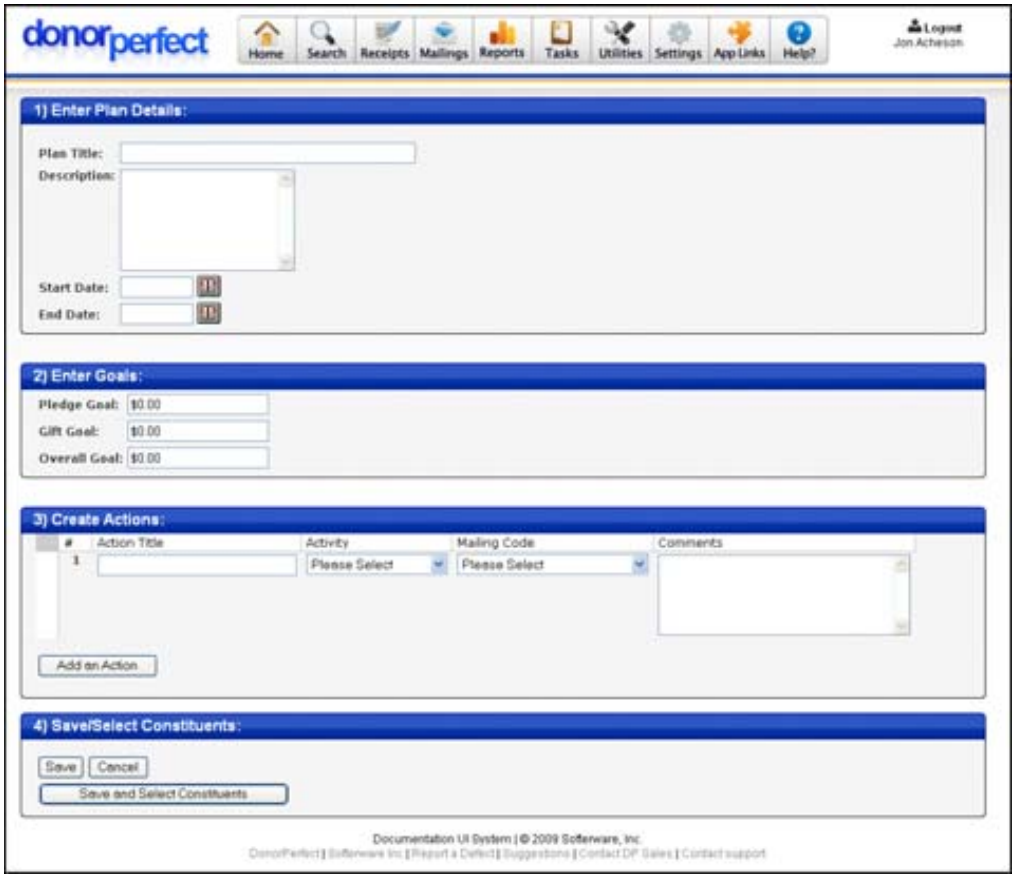
When you create a Moves Management Plan, you enter the details of the plan, including goals, start and end dates, and the actions included in the plan.

▶ To add a Moves Management Plan

1. In the navigation bar, click on **Tasks**, and then click **Moves Management**. The **Move Management Plans** screen appears.

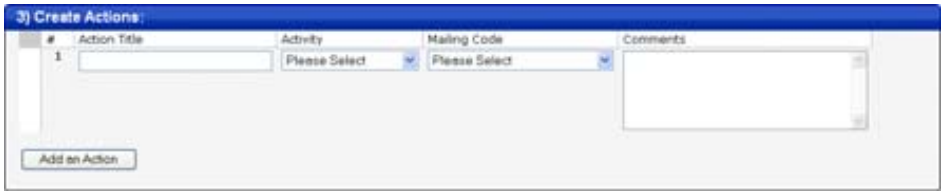


2. Click the **Add a New Plan** button.



3. Enter the following information for the plan:

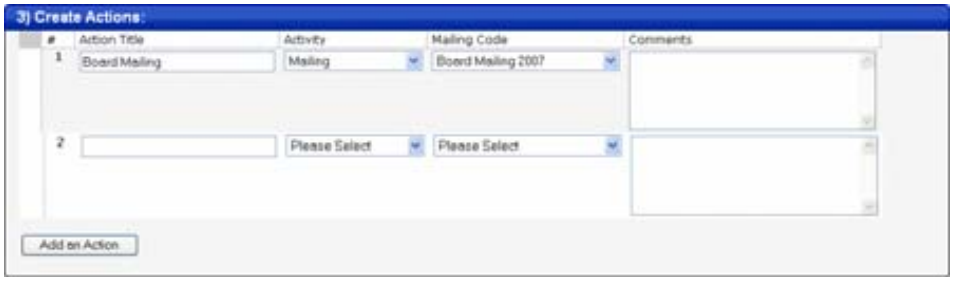
   - **Plan Title**: the name of the plan.
   - **Description**: a detailed description of the plan:
   - **Start Date**: the date the plan begins.
   - **End Date**: the date the plan ends.
   - **Pledge Goal**: the dollar amount for pledges you want to generate through the plan.
   - **Gift Goal**: the dollar amount for gifts you want to generate through the plan.
   - **Overall Goal**: the total dollar amount you want to generate through the plan.



4. In the **Create Actions** section, you can define the specific actions that are included in your plan. Start by defining the first action by entering the following information:

- **Action Title**: enter the title for that specific action (e.g., Annual Appeal Mailing).
- **Activity**: choose the contact management activity for this action (e.g., Mailing, Meeting, Telephone Call).
- **Mailing Code**: choose the mailing code that corresponds to the action.
- **Comments**: enter any comments related to the action.

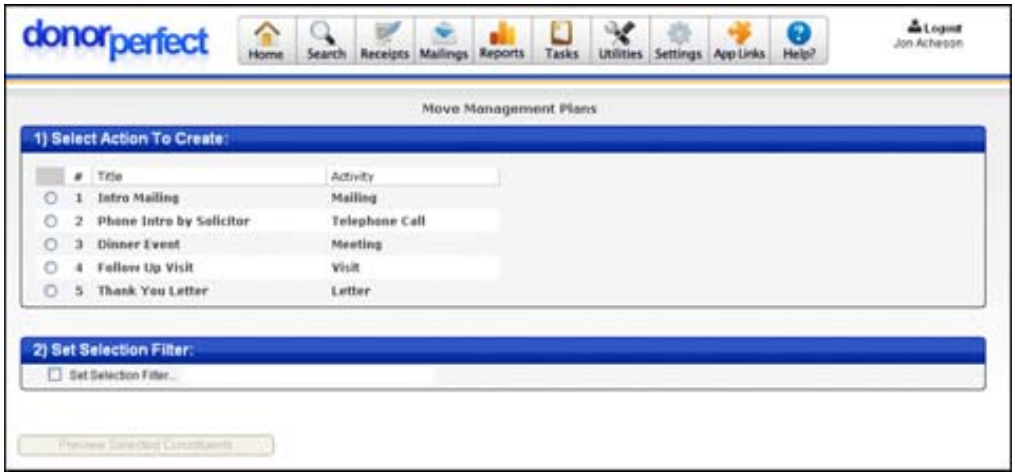
5. To add another action to the plan, click the **Add an Action** button. Another action row appears below the first action.



6. Enter the information for the action.
7. Repeat steps 5 and 6 until you've added all the actions for your plan.
8. When you're done defining all the actions, click the **Save and Select Constituents** button at the bottom of the scr`een.

> Note: If you want to save the plan without choosing donors, click the Save button. You can then go back later to choose donors.

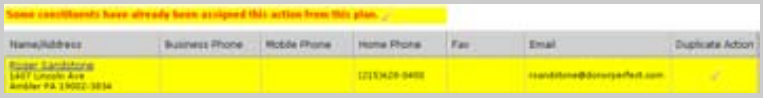
A screen appears with the actions in your plan listed.



9. From the actions listed, click the one that you want to create for the donors you'll choose in the next section. When an action is assigned to a donor, the system creates a contact management record corresponding to the action.

10. To set a selection filter defining which donors will be assigned the action, click the **Set Selection Filter** check box. For details on creating a selection filter, see the "Creating Selection Filters" section on page 166.

11. Click the **Preview Selected Constituents** button. A list of the donors you will create the action for appears.

> Note: If donors have already been assigned the action, they appear in the list but are highlighted in yellow.
>
> 

12. If you're satisfied with the list of donors that will be assigned to the action, scroll down to the bottom of the page to see the **Optional Contact Data** section, and enter the following information if it applies to the action:

> Note: If you want to fine tune the selection filter for the action, click the Back button in your browser to make changes.

- **Due Date**: the date the action is due.
- **Due Time**: the time the action is due.
- **Assigned To**: choose the user who is responsible for the action.
- **Completion Date**: the date the action will be completed. This field is useful, for example, if you're sending out a mailing and you know it will be done by a certain date.
- **Additional Comments**: any additional information you want to capture. These comments are appended to the comments you made for the action on the previous screen.

13. When you've completed all the information, click the **Create Action** button. A screen appears, telling you how many contact records were created for the action. You can now go to a donor's record, click the **Contacts** tab, and you'll see the action listed.

Editing a Moves Management Plan

After you added a Moves Management Plan to the system, you can make changes to it as necessary. You may want to change some of the details of the plan, add actions to the plan, or delete actions.

▶ To edit a Moves Management Plan

1. From the navigation bar, click on **Tasks**, and then click **Moves Management**. The **Move Management Plans** screen appears.
2. From the list of plans that appear, click the **Plan Title** for the plan you want to edit.

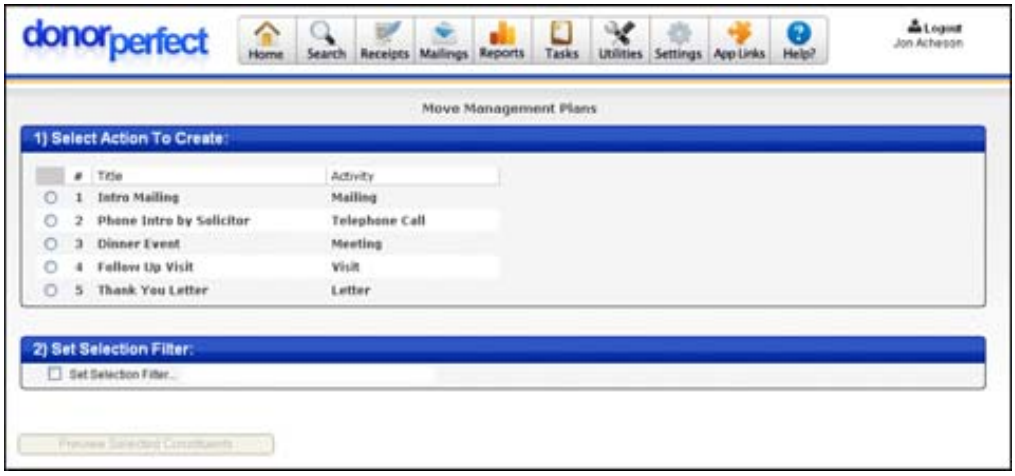
3. Make changes to the **Plan Details** and **Goals** information as necessary.
4. In the **Create Actions** section, you have the following options:
   - Make changes to any of the existing actions by modifying the information.
   - Adding a new action by clicking the **Add an Action** button and entering the applicable information.
   - Deleting an action by clicking the **Delete Action** button.
5. When you're done making changes to the plan, click the **Save** button. For details on assigning actions to donors after a plan is created, see the next section.

Assigning Actions to a Group of Donors

After you've set up a Moves Management Plan and assigned the first action, you can go back into the plan at a later time to assign the next action to the appropriate donor records. When you create an action, the system creates a contact record for the donor that tracks the action.

▶ To assign actions

1. From the navigation bar, click on **Tasks**, and then click **Moves Management**. The **Move Management Plans** screen appears.
2. Click the **Plan Title** for which you want to create new actions. The details of the plan appear.
3. Click the **Save and Select Constituents** button. A screen appears with the actions in your plan listed.



4. From the actions listed, click the one that you want to create for the donors you'll choose in the next step.
5. To set a selection filter for the group of donors you'll choose, click the **Set Selection Filter** check box. For details on creating a selection filter, see the "Creating Selection Filters" section on page 166.
6. Click the **Preview Selected Constituents** button. A list of the donors you will create the action for appears.

Note: If donors have already been assigned the action, they appear in the list but are highlighted in yellow.

7. If you're satisfied with the list of donors that appeared, scroll down to the bottom of the page to see the **Optional Contact Data** section.
8. Enter the following information if it applies to the action:
   - **Due Date**: the date the action is due.
   - **Due Time**: the time the action is due.
   - **Assigned To**: choose the user who is responsible for the action.
   - **Completion Date**: the date the action will be completed. This field is useful, for example, if you're sending out a mailing and you know it will be done by a certain date.
   - **Additional Comments**: any additional information you want to capture. These comments are appended to the comments you made for the action on the previous screen.
9. When you've completed all the information, click the **Create Action** button. A screen appears, telling you how many contact records were created for the action. You can now go to a donor's record, click the **Contacts** tab, and you'll see the action listed.

Assigning Actions for Individual Donors

Once you've created a plan and defined each action in it, you can assign subsequent actions in the plan for individual donors through their donor record. The way in which you do this varies depending on whether you are marking an action as completed and then assigning a new action or just assigning a new action.

Marking an Action as Completed and Assigning a New Action

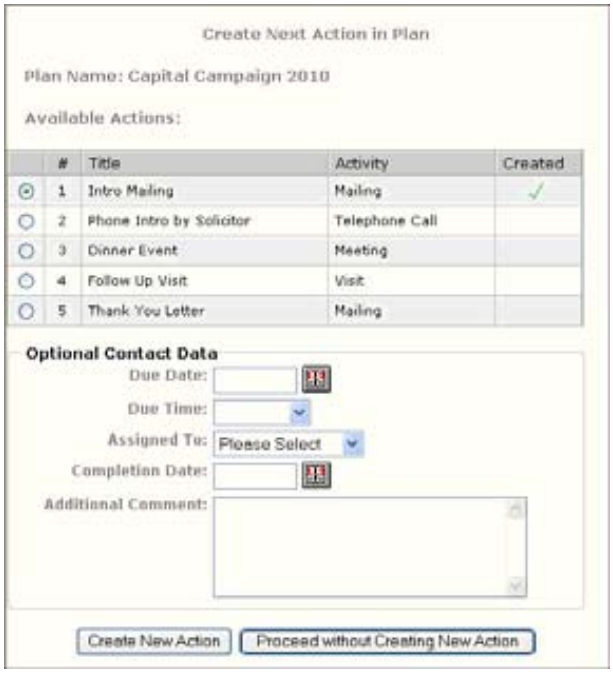
If you've completed an action that is included in a Moves Management Plan, you need to mark it as completed. When you do that, you'll have the option to assign a new action from the plan to the donor.

▶ To mark a completed action and assign a new action

1. Find the donor for whom you want to mark an action complete for.
2. Click the **Contacts** tab.
3. Find the contact record that is part of the Moves Management Plan that you want to mark as complete, and click the **Edit** link next to it.
4. In the **Completed Date** field, enter the date you completed the action for the plan.

5. Click the **Save** button. The **Create Next Action in Plan** page appears, showing you the other possible actions you can create for the donor. It shows you the action number, Title, Activity, and whether or not the action has been created for that donor.

6. Click the action you want to create. The **Optional Contact Data** section appears at the bottom.



7. Complete any of the Optional Contact Data you want to for this contact record.
8. Click the **Create New Action** button. A new contact record for the action you selected is now part of the donor's record.

Note: If you want to exit the Create Next Action in Plan page without creating an action, click the Proceed without Creating New Action button.

Assigning a New Action

You don't have to mark each action in a Moves Management Plan as completed in order to assign other actions from the same plan to a donor.

▶ To assign a new action

1. Find the donor for whom you want to assign another action from a plan.
2. Click the **Contacts** tab, and then click the **Add** button.
3. From the **Plan Name** pull-down, choose the plan that contains the action you to assign.
4. From the **Plan Action** pull-down, choose the action you want to assign. Any information you defined when you set up the action and plan is automatically completed.
5. Complete any other information for the contact record.
6. Click the **Save** button.

Running Moves Management Reports

DonorPerfect Online gives you several reports you can use to manage the Moves Management Plans you create in your system. For details on viewing the open and closed actions in your plan, see page 186. For reports that help you track the effectiveness of your plans, see page 243.

Pledge Reminders

This task generates a mail merge data file of pledge records that need reminders. The billing amount and frequency is set during the initial pledge entry. For details on entering pledges, see page 59.

Running Monthly Pledge Reminders

DonorPerfect requires that pledges be processed on a monthly basis; otherwise, the delinquent amounts will not be calculated correctly. The system automatically designates the current billing cycle as the month following the date of the last billing. A billing is defined as a time that pledge reminders have been created and the "Include Current Dues?" box has been selected. For example, if the billing was run for May 2006, the system will automatically designate June 2006 as the current billing cycle. However, this period can be easily adjusted by inputting the desired due date in the "mm/yyyy" field on the Pledge Reminder Options Screen.

▶ To run monthly pledge reminders

1. From the navigation bar, click **Tasks** and then click **Pledge Processing**. The Pledge Processing Screen appears.

2. Select the Billing Frequency Type (either **Weekly and Bi-Weekly**, or **Semi-Monthly, Monthly and above**).

> Note: The Last Reminder Sent box shows the date when pledge processing reminders were last run.

3. In the **Download reminders for pledges due (mm/yyyy)** field, enter the pledge due date for which you want to create reminders**.** The pledges in the data file will include pledges that have an amount due for the date entered. These will include the following:

   - Monthly pledges

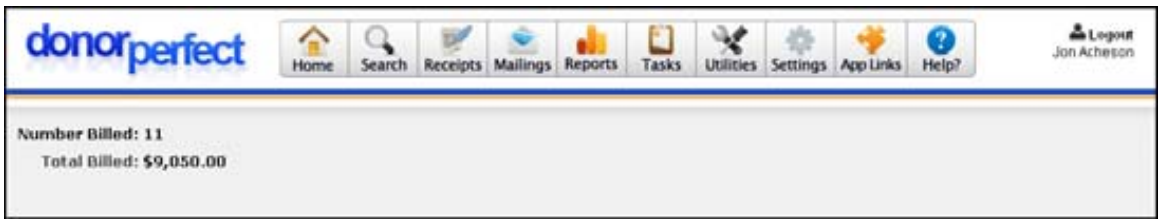
- Quarterly pledges due for that quarter
- Semi-annual pledges due for that half-year period
- Annual pledges whose start date is in the month
- Unusual payment schedule pledges with payments due that month.

DonorPerfect will automatically enter the month following the last time reminders were sent. To change, type in desired date.

4. The **For semi-monthly pledges, check for due dates up to** field selects which half of the month semi-monthly pledges will be sent out in. Select **first half of month (1st-15th)** or **second half of month (16th-31st)**.
5. Optional: Check **Set Selection Filter**. Use this option if you do not want to print all names with current dues. See "Using Selection Filters" on page 159 for details.
6. Check the **Update Delinquent Amounts** box unless the delinquent amount update has already been run for the month. The delinquent amount is the total amount billed (to date) minus payments.

Important: DELINQUENT AMOUNTS MUST BE UPDATED ONCE A MONTH TO KEEP THEM CURRENT! Updating them more often will cause the delinquent amount to be too high. Doing it less than once a month will cause the amount to be too low. Do not update delinquent amounts if you are running reminders for a period in which delinquent pledges have already been updated or if you are creating a mailmerge file of pledges for a reason other than running monthly reminders.

7. Check **Include Pledges where Reminder is not Checked?** to send reminders out to all outstanding pledges regardless of whether the Reminder box is checked or not.
8. Check **Include "NO MAIL" Addresses** to send reminders out to addresses marked as "Do Not Send Mail" in the Main Entry Screen.
9. Enter **Date to check seasonal addresses against** to specify the date.
10. Click **OK**. The **File Download** dialog box appears.
11. Choose **Save.** The **Save As** dialog box appears.
12. Select the drive and directory to save your file. The **File Name** field contains **donplg.txt** as its default; you can change this if you wish. Leave **Save as type** as it is.
13. Click the **Save** button**.**
14. A report appears in DonorPerfect Online, showing you the **Number Billed** and the **Total Billed** in the file you downloaded.



You are ready to print the pledge reminders. See "Appendix C" for directions on running mail merges for your type of word processor.

Updating Balances and Amounts

When Pledge Reminders are generated, the Delinquent amount on the pledge reflects the amount billed in the reminder process. When a Pledge Payment is made, both the balance and delinquent amount decrease accordingly. If a donor makes a payment during a period for which pledge reminders have not been run, the delinquent amount will be a negative number. This is accurate because they have pre-paid and should be credited that amount.

Each time pledge reminders are run and the delinquent amounts updated, the delinquent amount is increased by the **Amount to Bill** entered during Pledge setup. The following is an example of how pledge amounts are calculated:

Total Pledge	400.00
Amount to Bill	100.00
Start Date	06/01/06
Frequency	Quarterly

In this case, the donor will be billed four times at $100 a quarter, with the first pledge reminder sent out on 6/06. The **Balance Due** and **Delinquent Amount** will be calculated as follows:

Pledge Transactions	Balance Due	Delinquent Amount
Pledge entered in system	400.00	0.00
Pledge reminder sent 6/06	400.00	100.00
Payment made 7/06	300.00	0.00
Pledge reminder sent 9/06	300.00	100.00
Payment made 9/06	200.00	0.00
Early payment 11/06	100.00	-100.00
Pledge reminder sent 12/06	100.00	0.00
Payment made 12/06	0.00	0.00

9. Using Utilities

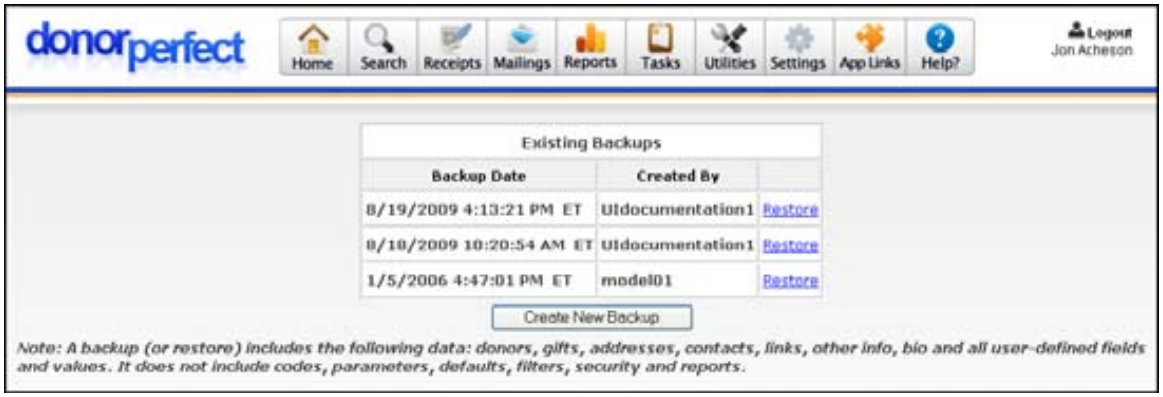
Using the Utilities portion of DPO, you can customize the system to your needs. The following functions are available from this menu:

- Backup and Restore (see page 305)
- Duplicate Removal (see page 307)
- EFT Migration (see page 314)
- Global Update (see page 315)
- Hosted File Storage (see page 318)
- Import 1.0 (see page 323)
- Import 2.0 (see page 329)
- Merge Purge (see page 348)
- Recalculate (see page 350)

Backup and Restore

Backups are very important to DonorPerfect. Every night, between 1 A.M. and 4 A.M. EST, your data is automatically backed up on our servers. We keep these backups for a period of 30 days. If you need to restore an automatic backup, please contact our customer support.

A user-initiated backup, however, is initiated by the user and creates a backup before performing a global update or other type system-wide change (for example, changing the screens). It is safe to create a backup at any time, and you are allowed to store up to 3 user-initiated backups.



▶ To create a backup

1. Click **Utilities**, click **Backup and Restore**, and then click the **Create New Backup** button. The following tables are included in the backup process:

dp	dpcontactudf	dpotherinfo
dpudf	dpflags	dpotherinfoudf
dpaddress	dpgift	dppledge
dpbill	dpgiftudf	dpuservalues
dpcontact	dplink	dpusermultivalues

▶ To restore a backup

1. Click **Utilities**, click **Backup and Restore**, and then click the **Restore** link next to the backup you want to restore.
2. To restore an existing backup, click **Restore**.

Note: Restoring a previous backup will completely overwrite the existing database. You want to make sure that everyone is out of the database before you restore a database. Any changes made to codes, flags, etc. since the last backup was created will NOT be kept after the backup is restored.

Duplicate Removal

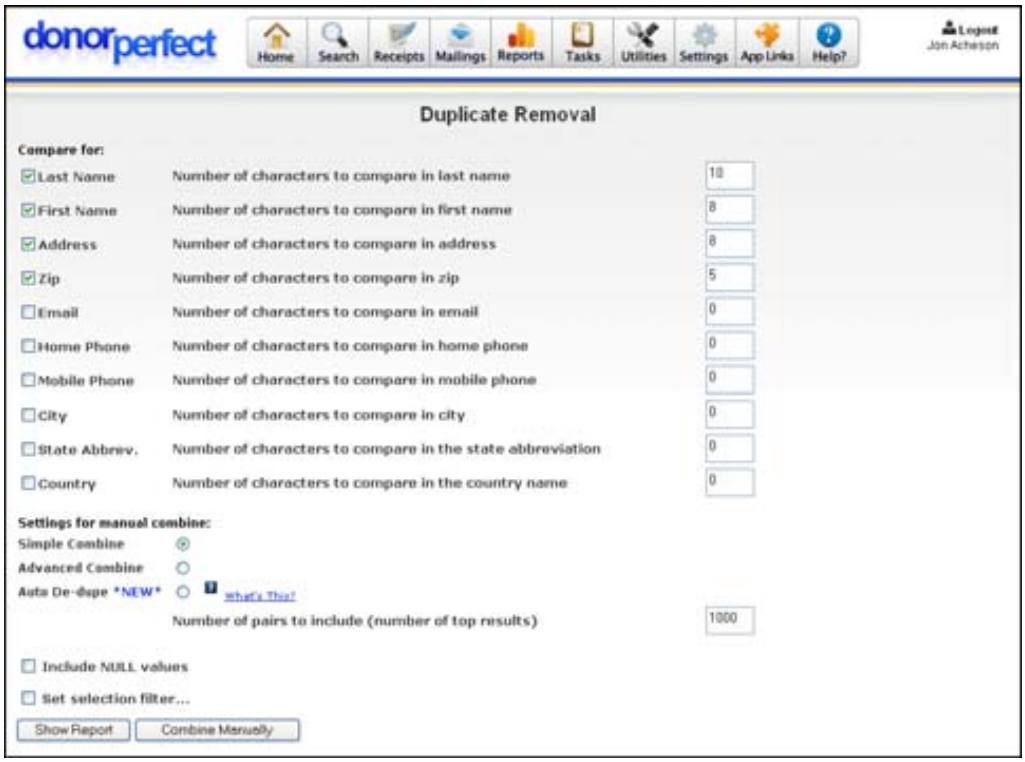
This option helps you eliminate duplicate records that have accidentally been entered into DonorPerfect.

List of Possible Duplicates

This option lists all paired records that fit a set of criteria you define.

▶ To see a list of duplicates

1. Select **Utilities**, and then click **Duplicate Removal**. The **Duplicate Removal** screen appears.



2. Check the fields you want to use to compare records:
   - Last Name
   - First Name
   - Address
   - Zip
   - Email
   - Home Phone
   - Mobile Phone
   - City

- State Abbrev.
- Country

3. For the fields that you checked, specify the number of characters you want to use to determine matches with the other records in the database.
4. In the **Settings** section, choose the type of combine you want to do:
   - **Simple Combine** allows you to combine only a standard set of information from one record into the other.
   - **Advanced Combine** allows you to choose which information from the Main and Bio screens you want to combine from each duplicate record.
   - **Auto De-dupe** allows you to automatically merge exact matches.
5. Check **Include Null Values** to include fields containing null values when comparing records. If this option is not checked, fields containing null values will be ignored.
6. Optional: **Set Selection Filter**. See "Using Selection Filters" on page 159 for details.
7. To view the list of duplicates, click the **Show Report** button. The report will display two columns of matching donor records. For details on how to combine records—see the following section.

Combine Duplicates

The three combine settings (**Simple Combine**, **Advanced Combine** and **Auto De-dupe**) combine two records into one. You have two options, however, on how you combine the duplicate records:

- **Show Report** lets you scan through the list of possible duplicate records one by one. See "Combine Duplicates by Scanning" page 309 for details.
- **Combine Manually** lets you pull up any two names for combining. Any alternate addresses, phone numbers, gifts, pledges, and other info transactions attached to the record you delete will get placed in the other name's transaction history. The type of combine you choose affects which information you can combine. **Simple Combine** allows you to combine only a standard set of information from one record into the other. **Advanced Combine** allows you to choose which information from the Main and Bio screens you want to combine from each duplicate record. See "Combine Duplicates Manually" page 311 for details.

The **Auto De-dupe** setting uses **Show Report**, but its functionality is different from either **Simple Combine** or **Advanced Combine**. See "Auto De-dupe" page 312 for details.

All transactional records from the two duplicate records, such as gifts, pledges, alternate addresses and contact records, will be combined together in the final combined record. The combined record will contain the sum of the transactional records from both duplicate records.

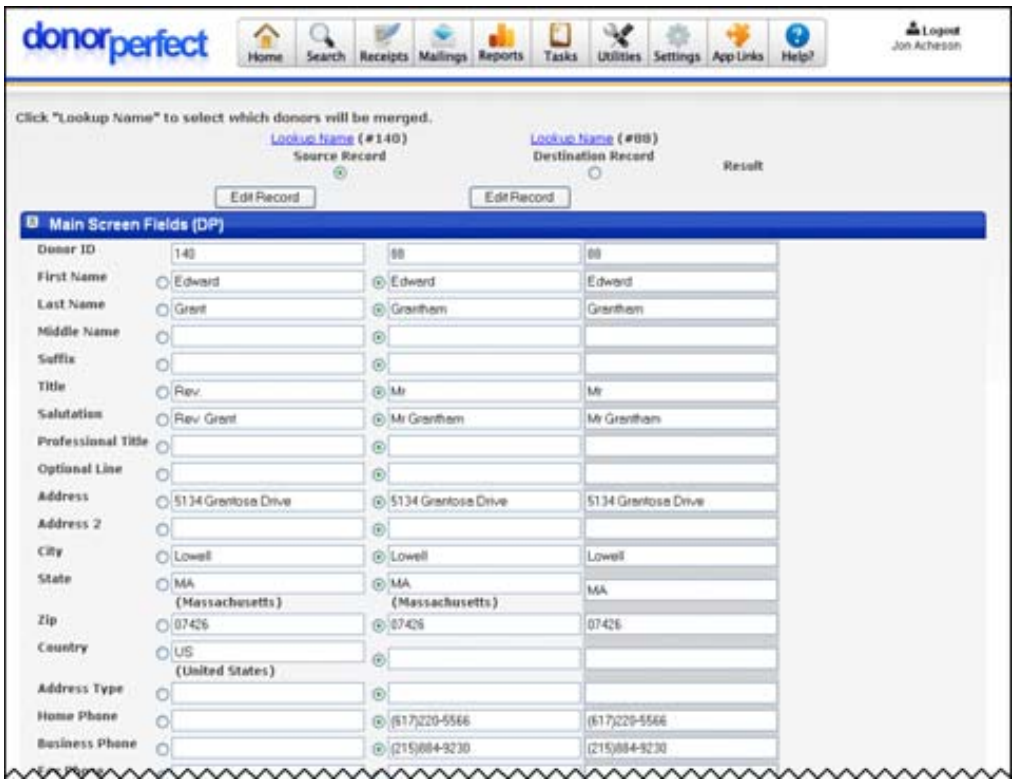
Combine Duplicates by Scanning

▶ To combine duplicates by scanning

1. In the navigation bar, click on **Utilities** and then **Duplicate Removal**. The Duplicate Removal screen appears.
2. In the **Settings** section, choose the type of combine you want to do. **Simple Combine** allows you to combine only a standard set of information from one record into the other. **Advanced Combine** allows you to choose which information from the Main and Bio screens you want to combine from each duplicate record.
3. Click on the desired file comparison method and then enter the number of characters you want to compare for the method you choose. The available comparison methods are:
   - Last Name
   - First Name
   - Address
   - Zip
   - Email
   - Home Phone
   - Mobile Phone
   - City
   - State Abbrev.
   - Country
4. Optional: **Set Selection Filter**. See "Using Selection Filters" on page 159 for details.
5. Click **Show Report**. The **Duplicate Report Screen** appears. This report shows a list of possible duplicates.

6. Click **Simple** or **Advanced** next to the pair you wish to combine. The Duplicate Removal screen appears. The information that appears on this screen is different depending on whether you chose **Simple** or **Advanced:**

Duplicate Removal Screen, Simple Version



Duplicate Removal Screen, Advanced Version

7. Choose the information you want to keep, using one of the following methods:

   a. For **Simple Combine**: choose one of the **arrow** options in the middle to delete one record and move its transactional information into the other record:

      i. The -> arrow will merge the left record to the record on the right, leaving the record on right.

      ii. The <- arrow will merge the right record to the one on the left, leaving the record on the left.

b. For **Advanced Combine**: a list of information from the **Main Screen** and the **Bio Screen** appears for each duplicate donor. From the **Source Record** and **Destination Record** columns, you can choose which data you want to keep from each record. To do this, click the radio button to the left of the information you want to keep—this information will be retained and information from the other record for the same field will be discarded. In the **Result** column on the right, you can see which information will be kept for each field.

8. When ready, click **Combine** to combine the records.

Combine Duplicates Manually

▶ To combine duplicates manually

1. Select **Utilities**, and then click **Duplicate Removal**. The Duplicate Removal screen appears.
2. In the **Settings** section, choose the type of combine you want to do. **Simple Combine** allows you to combine only a standard set of information from one record into the other. **Advanced Combine** allows you to choose which information from the Main and Bio screens you want to combine from each duplicate record.
3. Click **Combine Manually**. The **Merge Duplicates Screen**, where you can look up names, appears.

4. On the left, click on **Lookup Name**. Pull up the name to delete.
5. On the right, click on **Lookup Name**. Pull up the name with which you want to combine the first record.
6. Choose the information you want to keep, using one of the following methods:
   - For **Simple Combine**: choose one of the **arrow** options in the middle to delete one record and move its transactional information into the other record. The -> arrow will merge the left record to the record on the right, leaving the record on right. The <- arrow will merge the right record to the one on the left, leaving the record on the left.

- For **Advanced Combine**: a list of information from the **Main Screen** and the **Bio Screen** appears for each donor. From the **Source Record** and **Destination Record** columns, you can choose which data you want to keep from each record. To do this, click the radio button to the left of the information you want to keep—this information will be retained and information from the other record for the same field will be discarded. In the **Result** column on the right, you can see which information will be kept for each field.

7. When ready, click **Combine** to combine the records. You can then look up the next pair of names to merge.

Auto De-Dupe

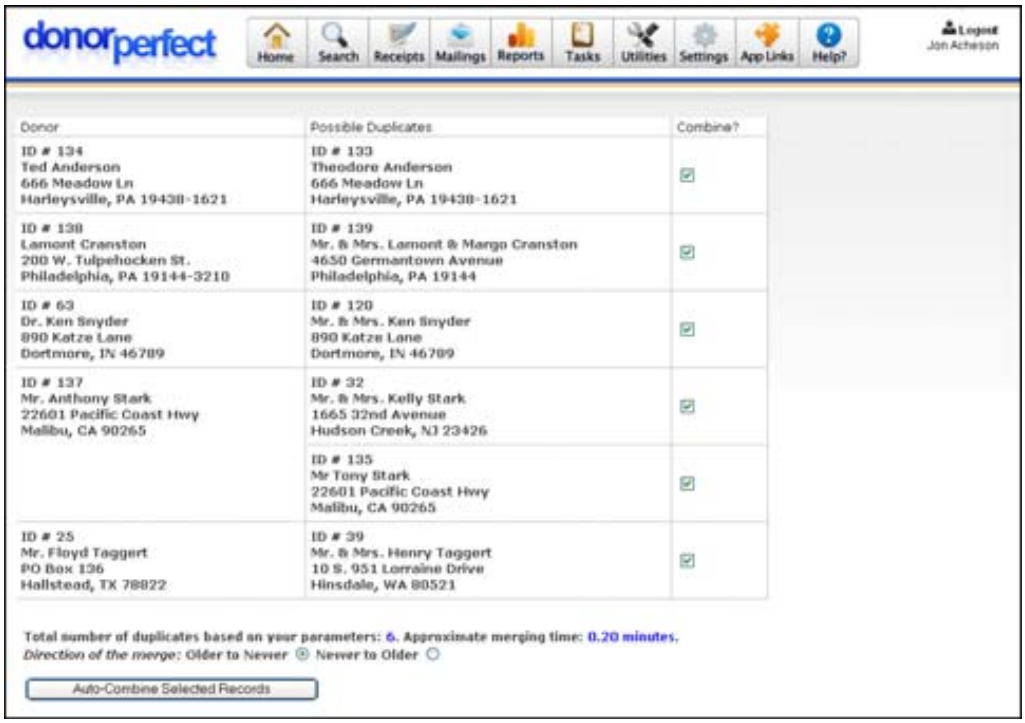
The **Auto De-dupe** function of the Duplicate Removal screen generates a report that lists all exact matches between duplicate records.

Warning! The Auto De-dupe function will delete duplicate records. Because of the difficulty of recovering duplicate records, we recommend you back up your database before using this function.

▶ To run the report

1. Select **Utilities**, and then click **Duplicate Removal**. The Duplicate Removal Settings screen appears.
2. Check the fields you want to use to compare records:
   - Last Name
   - First Name
   - Address
   - Zip
   - Email
   - Home Phone
   - Mobile Phone
   - City
   - State Abbrev.
   - Country
3. For the fields that you checked, specify the number of characters you want to use to determine matches with the other records in the database.
4. Under **Settings for Manual Combine**, select **Auto De-dupe**.

5. Check **Include Null Values** to include fields containing null values when comparing records. If this option is not checked, fields containing null values will be ignored.
6. Check **Set Selection Filter** to put an optional selection filter in place. Only the records that pass the selection criteria will be checked for duplicates. See "Using Selection Filters" on page 159 for details.
7. To view the list of duplicates, click **Show Report**. The report will display all of the duplicate records that were found:



   At the bottom of the report, the number of duplicate records found, and the approximate time to merge the duplicates is listed.
8. In the **Combine?** column of the report, check the records you want to automatically combine. Clear the **Combine?** checkbox for records you do not want to automatically combine.
9. Select which duplicate record will overwrite the others:
   - If **Older to Newer** is selected, the oldest record will be kept, and the newer records deleted.
   - If **Newer to Older** is selected, the newest record will be kept, and the older records deleted.
10. Click the **Auto-Combine Selected Records** button.

11. Click the **Ok** button to automatically combine the duplicate records. A new screen will appear displaying a progress bar that shows how the Auto De-dupe process is proceeding:

12. Once the Auto De-dupe process is complete, the progress bar will be replaced by a button to return you to the Duplicate Maintenance screen:

EFT Migration

The **EFT Migration** item in the **Utilities** menu is used to migrate account information from the older CheckFree version of EZ-EFT over to the SafeSave Payments Gateway. If you have previously entered credit card or bank accounts for use with CheckFree, this process allows you to set up those accounts as Payment Methods for use with the SafeSave Payments Gateway.

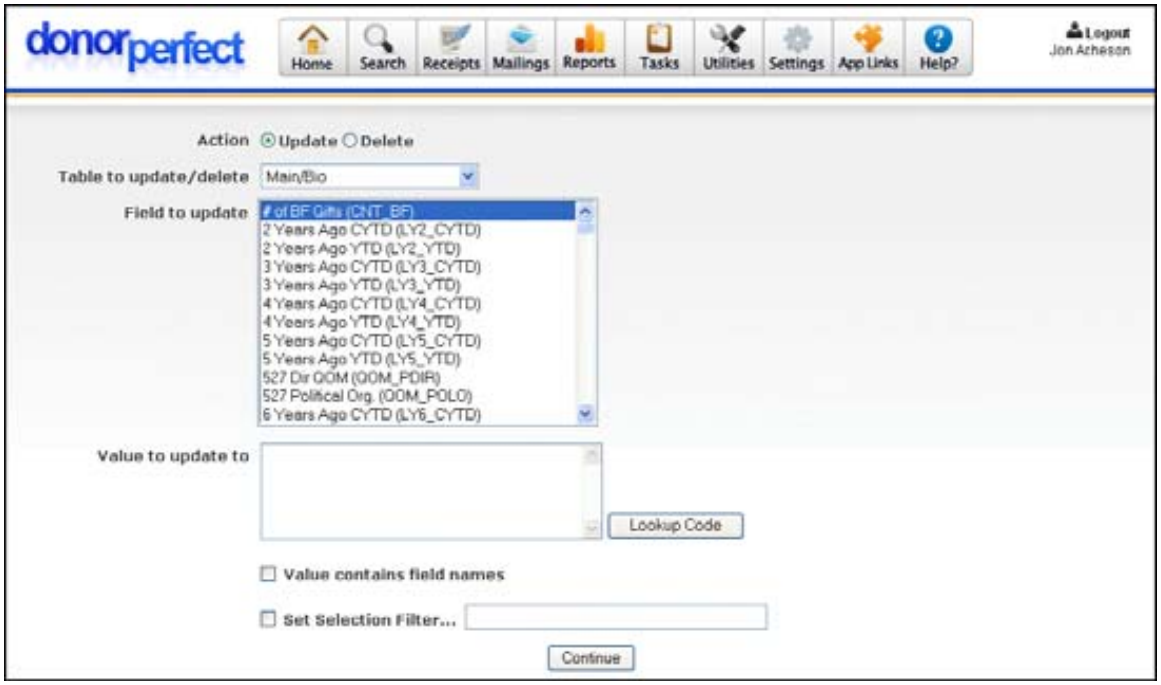
In addition to allowing you to use the accounts with the SafeSave Payments Gateway, the migration process also moves the information from a local database over to the secure PCI-compliant storage provided by the SafeSave Payments Gateway. This greatly enhances the security of your account information.

For details on migrating your CheckFree account information using this feature, please contact your SofterWare support representative.

Global Update

A Global Update allows you to update multiple records at the same time.

Warning! You should always back up your system before using Global Update. See "Backup and Restore" page 305 for details.



To access the screen, from the navigation bar, select **Utilities** then click on **Global Update**.

For each global update, you need to choose the following options:

- **Action:** Either update data, using the **Value to update to** field below, or delete data. Be sure when performing either function that your filter selects the appropriate data.
- **Table to Update/Delete:** The table that will be updated or deleted.
- **Field to Update:** The field that will be updated.
- **Value to Update to:** The new value that will replace the existing value.
- **Value Contains Field Names:** Check this box if you want to replace the value of a field with the contents of another field. For example, you may want to update the SALUTATION field and have it update to the FIRST_NAME field.
- Optional: **Set Selection Filter**. See "Using Selection Filters" on page 159 for details.

Global Updating from One Table to Another

Currently, if you try to run the global update from a standard field (for example, Last Name, First Name, Optional Line, Salutation, Etc.) to a user-defined field, you will get a message that the process was unsuccessful. To perform the global update, you will need to follow the steps listed below.

Updating a Standard Field with Data from a User-Defined Field

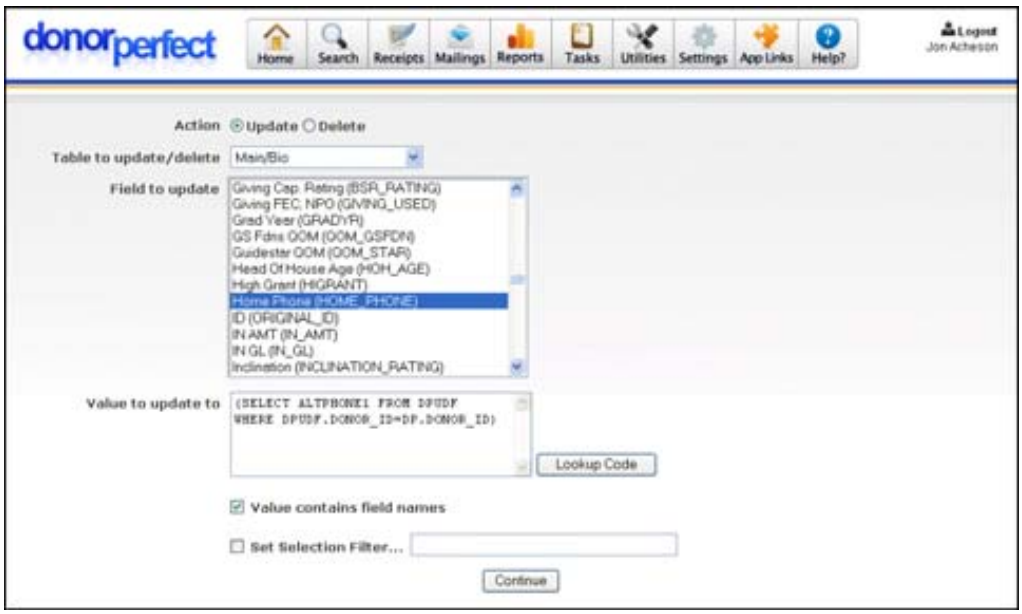
For example, you want to update **DP.HOME_PHONE** with the value in a custom field called **DPUDF.ALTPHONE1**.

▶ To update a standard field with data from a user-defined field

1. Select the **Main/Bio** table from the pull-down and the **HOME_PHONE** field in the field list.
2. In the **Value to update to** text field, enter (**SELECT ALTPHONE1 FROM DPUDF WHERE DPUDF.DONOR_ID=DP.DONOR_ID)**. You would enter this instead of **DPUDF.ALTPHONE1**.

Note: The statements are not case-sensitive.

3. Check the **Value Contains Field Names** check box.
4. Optional: Set Selection Filter. See "Using Selection Filters" on page 159 for details.

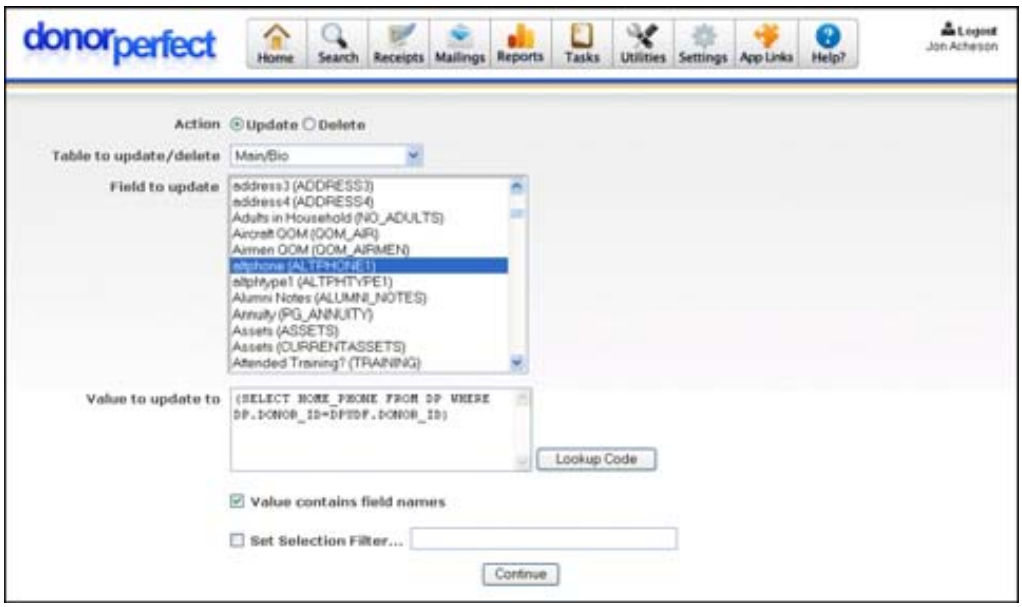


Updating a User Defined Field with Data from a Standard Field

Let's say you want to do it the other way around - you want to update **DPUDF.ALTPHONE1** with the value from **DP.HOME_PHONE**.

▶ To update a user-defined field with data from a standard field

1. Select the **Main/Bio** table from the pull-down, and the **ALTPHONE1** field in the field list.
2. In the **Value to Update to** field, enter **(SELECT HOME_PHONE FROM DP WHERE DP.DONOR_ID=DPUDF.DONOR_ID).** You would enter this instead of **DP.HOME_PHONE**.
3. Check the **Value Contains Field Names** check box.



Note: As you can see, it's very similar to the SQL subquery syntax. The idea is to match up the donor_id's in DP and DPUDF, or the gift_id's in DPGIFT and DPGIFTUDF, or the other_id's in DPOTHERINFO and DPOTHERINFOUDF, etc.

See Appendix E for each table's field names.

Hosted File Storage

Managing documents, spreadsheets, photos, news clippings and other important materials related to donors, volunteers, gifts and grants can be a real hassle. How can you make sure they are available to everyone who needs them, regardless of if you are in the office or on the road?

DonorPerfect Online's new Hosted File Storage feature makes it easy to solve these challenges without creating an extra IT burden. It allows you to simply attach the files to the relevant records in your system. Files can be attached to Constituent, Gift, Pledge, Other Info, Tribute, Contact and Addresses records.

Common uses include:

- Grant request documents
- Spreadsheets for constituents, gifts, or pledges
- Copies of correspondence
- Stock or in-kind gift valuation letters
- Scanned pledge cards & authorization forms
- Scanned news clippings, notes or business cards
- Planned giving proposals or legal documents
- Photos from events
- Articles written by or about the constituent
- Uploading images that can be embedded in email acknowledgment templates.

Uploaded files must be associated with a record. They cannot be uploaded to the system "by themselves." There is no limit to the number of files that can be attached to a record, but there are upper limits to the total

Hosted files are backed up along with system records when the Backup utility is used.

Enabling Hosted File Storage

To purchase and enable Hosted File Storage, simply click on the navigation link located under Utilities and a message box will appear with information on how to obtain and activate this feature.

Managing Hosted File Storage User Security Settings

Once you have purchased the Hosted File Storage module, you will need to enable it in the User Security screen.

▶ To enable Hosted File Storage

1. In the navigation bar, click the **Settings** button, then click **User Security**.

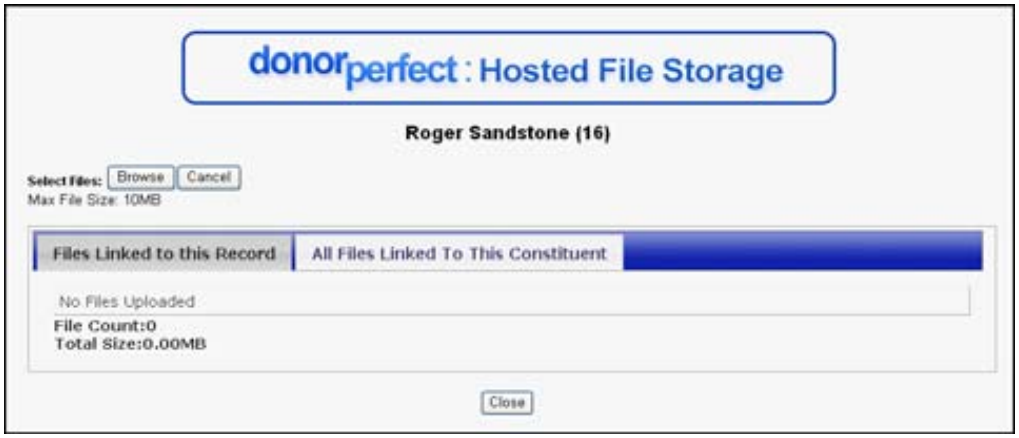
2. Next to your **User ID**, click the **Edit** button.
3. In the **Utilities** section, check the **File Upload** and **File Upload Admin** options.
4. Click the **Save** button.
5. Log out, and log back into DonorPerfect Online.

Attaching Hosted Files to Records

Files can be attached to Constituent, Gift, Pledge, Other Info, Tribute and Contact records using the **Attach a File/View Attached Files** link at the top of the screens.

▶ To attach a file to a record

1. Open the record for editing.
2. Click on the **Attach a File** link at the top of the screen. (If this record already has a file attached, it will read **View Attached Files** instead) The Hosted File Storage screen appears.



3. Click the **Browse** button.
4. In the standard File Open screen that appears, select the file you want to attach to the record, then click the **Open** button. The file will be uploaded to the DonorPerfect Online system, and will appear in the Hosted File Storage screen:

5. Click the **Close** button to close the Hosted File Storage screen and return to the record screen.

Listing Hosted Files Attached to a Record or Constituent

You can list the files attached to a record, or all files attached to the current constituent.

▶ To list the files attached to a record or constituent

1. Open the record for editing.
2. Click the **View Attached Files** link at the top of the screen. The Hosted File Storage screen appears.

3. Click the **Files Linked to this Record** tab to list the files linked to the current constuent, gift, pledge, tribute, Other Info or contact record (see above).
4. Click the **All Files Linked to This Constituent** tab to list all of the files linked to all of the records associated with this constituent:

5. Click the Close button to close the Hosted File Storage screen and return to the record screen.

You can also view the files associated with a constituent from the Hosted File Management screen (see page 321).

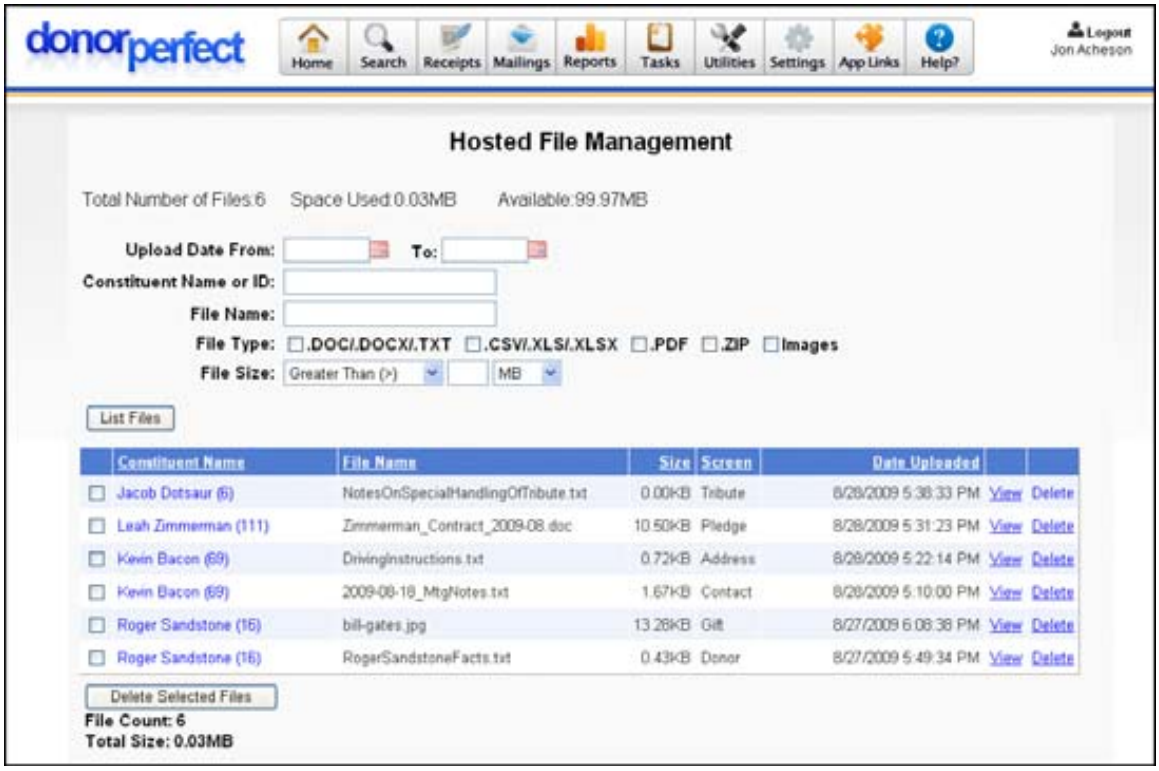
Viewing the Contents of Hosted Files Attached to a Record

To open a file attached to a record, list the files (see above) and click on the **View** link in the file listing. You will be prompted to save the file to your computer, or open it in the default application for that file type.

Deleting Hosted Files Attached to a Record

To delete an attached file from the server, list the files (see above) and then click on the **Delete** link in the file listing. You will be prompted to confirm deletion. Once deleted from the server, the file cannot be recovered. The Backup feature backs up hosted files along with the system, however, so restoring from a backup will restore a file.

Managing Hosted Files from the Hosted File Storage Screen



The Hosted File Management screen allows you to manage the files that have been attached to records in your system. You can list the files stored in your system, using search criteria to narrow down your search if necessary. You can also view and delete the hosted files.

To access the screen, from the navigation bar, select **Utilities** then select **Hosted File Storage**.

Listing the Hosted Files in the System

The upper part of the Hosted File Management screen contains a set of fields that you can use to enter search criteria for hosted files:

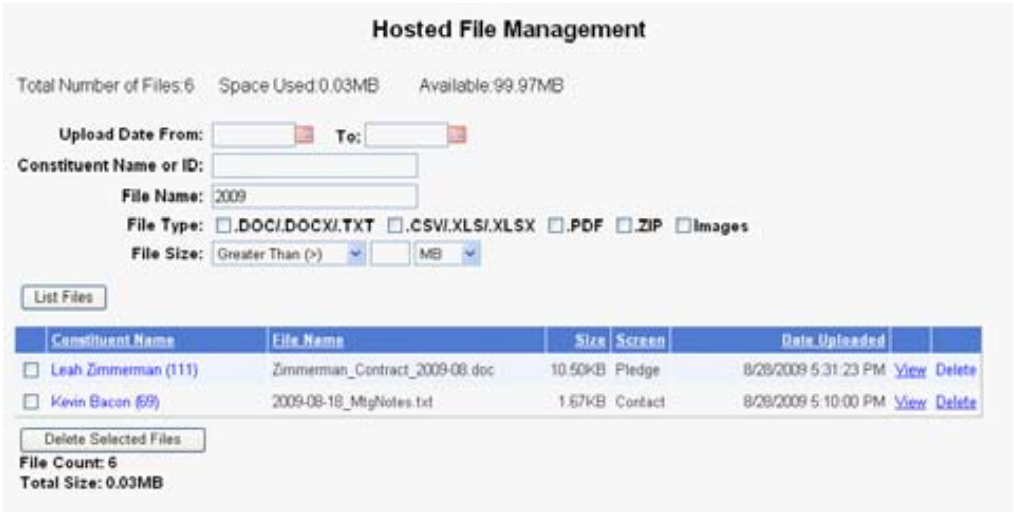
By default, all hosted files in the system are displayed. When working with a system that has many hosted files, it may be useful to limit the files that are displayed using search criteria.

▶ To limit the files that are listed using search criteria

1. Enter search criteria into one or more of the following fields:

Upload Date From/To	Enter a date range. Only files uploaded within the specified date range will be listed.
Constituent Name or ID	Enter the name or Donor ID of a constituent. Only files attached to this constituent's records will be listed.
File Name	Enter all or part of a file name. Only files whose names contain the specified text will be listed.
File Type	Select the type of file that you want to be listed.
File Size	Allows you to limit the display of files according to their file size. Select Less than (<) or Greater Than (>), enter a number for the size limit, then select MB or GB.

2. Click the **List Files** button. Only the files that match the search criteria will be displayed:



3. To display all files again, empty the fields and click the **List Files** button again.

Viewing the Contents of Hosted Files

To open a file, click on the **View** link in the file listing. You will be prompted to save the file to your computer, or open it in the default application for that file type.

Deleting Hosted Files

To delete a hosted file from the server, click on the **Delete** link in the file listing. You will be prompted to confirm deletion.

To delete several files at once, check the boxes to the left of the file listings and click the **Delete Selected Files** button. You will be prompted to confirm deletion.

Once deleted from the server, the file cannot be undeleted. The Backup feature backs up hosted files along with the system, however, so restoring from a backup will restore a file.

Import 1.0

DonorPerfect Online allows you to import donor information. This module allows you to:

- Add New Donors
- Update Existing Donors
- Add Gift Information
- Insert Contact Data
- Insert Flags

It is important that your data be in the correct format.

1. We will go over how to create your data in the proper format to be imported.
2. We will then go over the import process.
3. Finally, we will cover checking your data to ensure the import was successful.

Creating a File

Most commonly, your data will already be in a comma-delimited MS Excel file (CSV). If it isn't, it should be converted or exported into that format. Perhaps the most important parts of the data are the field names. The field names must be at the top of the columns in the CSV file, and they must match the field names in DPO. If these field names do not match, the import will fail because the program will not know where to put the data. You can find a list of field names for each table in Appendix E.

There are a few important things to keep in mind. If your fields cannot be matched in the table (fields are missing or mislabeled), a required field is missing (such as donor_ID), or if the donor_ID in the import is smaller than the largest donor_ID in the database, the import will not complete.

Inserting a Single Data File

Once you have your file ready, the import process is simple. You will insert data when the data is completely new.

▶ To insert a single data file

1. Click **Utilities**, and then click **Import 1.0**.
2. From there, you will decide which table you want to import the file into. For example to import names, user defined fields, addresses, and flags select **dp/dpudf/dpaddress/dpflags**. Gifts will go into the **dpgift/dpgiftudf**, etc.
3. Once you have the table selected, browse to find the file you want to import.
4. Since you are importing new data, select **Insert**.
5. Click **Next**.
6. Once the file parses (checks for errors), click **Import**, and the file import will complete.

Notice that the field names are listed along with the table name. Some imports will have field names in different tables. For instance, when you import both names (new Donor records) and addresses, the names and primary addresses will go into the **dp** table, but any secondary addresses will go into a separate table called **dpaddress**. You will need to put the data into two separate data files: one containing the names, Donor IDs and primary addresses, to be read into the **dp** table, and one containing the secondary addresses, one per record and identified by Donor ID, to be read into the **dpaddress** table. You must import the names and Donor IDs before you import the secondary addresses.

Below is an example of a bad import file. The circles show the problems with the file.

	A	B	C	D	E	F	G
1	first_name	lastname	main address	address2	city	state	zip code
2	Jim	Berkley	4656 135th Ave.		Hamilton	ID	99419
3	Kathy	Demetral	2454 Riley Ave.		Elkins Park	PA	19117
4	Jacob	Dotsaur	2015 72nd St S.W.		Byron Center	TX	78315
5	James	Emerson	Box 83		Hamilton	Rhode Island	1018
6	Edward Grant		5134 Grantosa Drive		Lowell	MA	7426
7		Edward Hobart	3335 Perry St.		San Diego	CA	92166
8	Joan	Jett	23 Sunset Blvd.		Hollywood	CA	99744
9	Cal	Johnson	7830 Cardinal Dr.		Jenison	TX	74922
10	Calvin	Johnson	7830 Cardinal Drive		Jenison	TX	74922-4011
11	Albert D	Sylvester	6481 N. Lakeshore Dr.		West Olive	TX	62511
12	Henry	Taggert	10 S. 951 Lorraine Dr.		Hinsdale	WA	80521
13	Tim	Tarkonston	6092 Laurelwood Dr.		Hudsonville	WI	53688
14	Howard	Warner	1390 32nd Ave.		Blue Hills	CA	92533
15	Tom	Warner	1390 32nd Ave.		Blue Hills	CA	92533
16	Tony	Thoman	123 Main St.		Philly	PA	18914
17	Jeff	Mery	56343 Tower Park Road		Toledo	OH	65532
18	Jonathan	Kashub	1254 Bethleham Pike		Ft. Washington	PA	19034

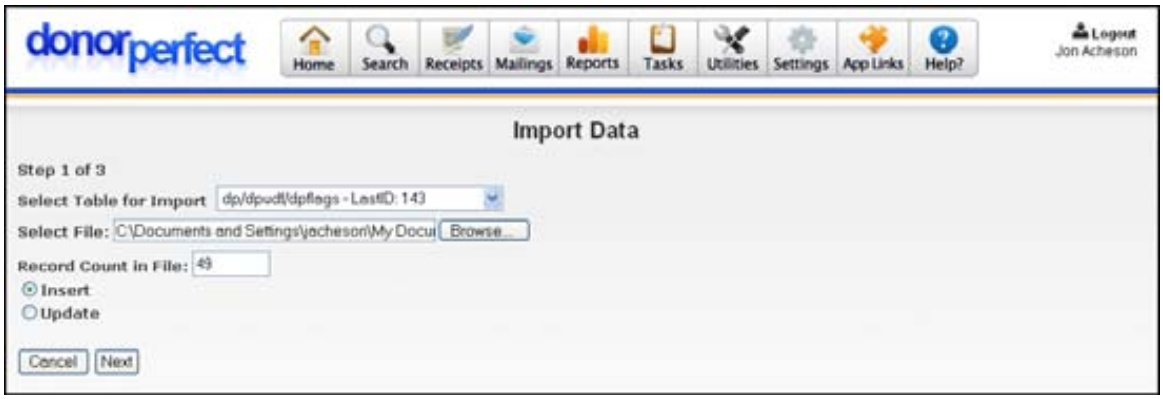
- "Last name" should be "last_name".
- First names and last names should be separated into the correct fields.
- "Main address" should be just "address".
- "Philly" should be corrected to "Philadelphia".
- The state field must contain exactly two characters, not the entire state name.
- "Zip code" should just be "zip".

- Secondary addresses need to be put into a separate data file, and identified by Donor ID, so that they can be imported into the **dpaddress** table in a separate step, after the donor records have been imported.
- "City" needs to have the carat to make the data drop into the correct table.

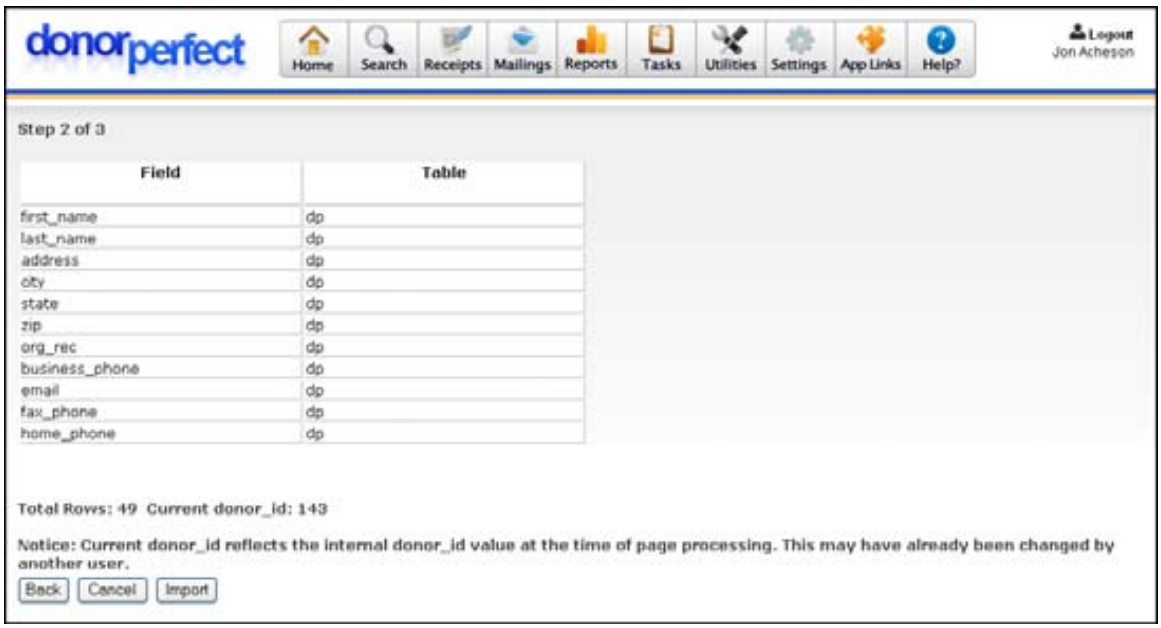
The picture below shows those problems corrected.

	A	B	C	D	E	F	G
1	first_name	last_name ✓	address ✓	address2	city	state	zip ✓
2	Jim	Barkley	4656 135th Ave.		Hamilton	ID	99419
3	Kathy	Demetral	2454 Riley Ave.		Elkins Park	PA	19117
4	Jacob	Dotsaur	2015 72nd St. S.W.		Byron Center	TX	78315
5	James	Emerson	Box 83		Hamilton	RI ✓	04018
6	Edward	Grant	5134 Grantosa Drive		Lowell	MA	07426
7	Edward	Hobart ✓	3335 Perry St.		San Diego	CA	92166
8	Joan	Jett	23 Sunset Blvd.		Hollywood	CA	99744
9	Cal	Johnson	7830 Cardinal Dr.		Jenison	TX	74922
10	Calvin	Johnson	7830 Cardinal Drive		Jenison	TX	74922-4011
11	Albert D.	Sylvester	6480 N. Lakeshore Dr.		West Olive	TX	62511
12	Henry	Taggert	10 S. 951 Lorraine Dr.		Hinsdale	WA	80521
13	Tim	Tarkonston	5092 Laurelwood Dr.		Hudsonville	WI	53688
14	Howard	Warner	1390 32nd Ave.		Blue Hills	CA	92533
15	Tom	Warner	1390 32nd Ave.		Blue Hills	CA	92533
16	Tony	Thoman	123 Main St		Philadelphia ✓	PA	18914
17	Jeff	Mery	56343 Tower Park Road		Toldeo	OH	65532
18	Jonathan	Kashub	1254 Bethlehem Pike		Ft. Washington	PA	19034

Note that you must enter an approximate record count. If you are importing a file with greater than 10,000 records, your import will not proceed if the time of day is between the hours of 9:00 A.M. and 6:00 P.M. EST, Monday through Friday. Any other time, you may import files much larger, though extremely large files may cause the process to time out.



Importing a Gift



Import Data Parsed

Inserting Multiple Data Files (Advanced Users)

If your data is contained in one file (for instance if your file has name, address, gift date, and amount), you must insert the file as two separate files. The first file you need, will be the donor file that will be uploaded into the donor table. It will have the name, address, etc. The second file will be the gifts file that will be uploaded into the dpgift table. To import it successfully, the system will need to know who to assign the gifts to, and it knows by assigning a unique donor_ID to each record. We recommend a simple way to assign a donor_ID to each donor, and make sure that each gift is assigned the appropriate donor_ID as well.

Creating a Unique Donor_ID

▶ To create a unique donor_ID

1. Click **Utilities**, and then click **Import Data**.
2. Notice the Last ID: #### beside each table in the **Select table for import** pull-down.
3. Write down the relevant donor_ID.
4. Open your comma-delimited file in Excel.
5. Insert a column to the left of your data.
6. Name the column "donor_ID", and enter the donor_ID (plus one) that you wrote down earlier beside the first record.
7. Enter the next sequential donor_ID for the next record, highlight both donor_IDs you entered, and click on the lower right corner of the highlighted selection. (It will show a plus sign.)

8. Drag the plus sign down to the last record, and when you release the mouse button, each record will have a unique donor_ID.

Separating Your Data

Now that each record has a unique donor_ID, you need to separate your data to be entered into the database as discussed above. The goal of these next steps is to divide your data into two sets, while maintaining a primary key (donor_ID).

▶ To separate your data

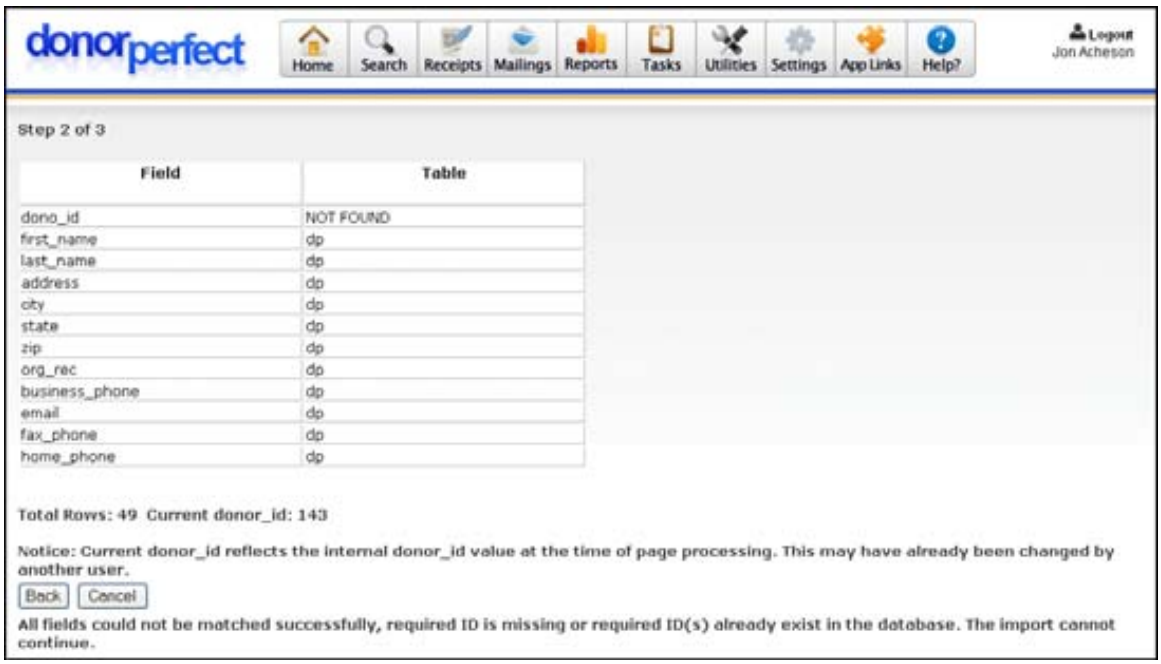
1. In Excel, create a copy of your data in another spreadsheet.
2. **Save** one spreadsheet as Donors, and the other as Gifts.
3. Be sure to keep the donor_ID data in both spreadsheets, so that the import module will know where to assign the gifts.
4. Open the Donors spreadsheet and delete the data that will not upload into the donor table, and **Save.** For example, delete gift_date, amount, gl_code, etc.
5. Open the Gifts spreadsheet and delete the data that will not upload into the gift table. The data left should be the data that you deleted from the previous table. (gift_date, amount, gl_code, etc.)

You should now have your data divided into two comma-delimited files (CSV). One contains your donor information, while the other contains your gift information. Both should have a donor_ID column, and those donor_IDs should match a donor to that donor's gifts.

To import the data, proceed to the Insert a Single Data File section, remembering to insert the donor file first, and then the gift file second.

Updating Data in DPO

You will update your data when you have a set of data that will update records you already have in your database. The process is nearly the same as an insert. The real difference will be in your file. It must have a donor_ID that matches data in your table. Without this donor_ID, the module will not know where to place the new data, and the import will fail:



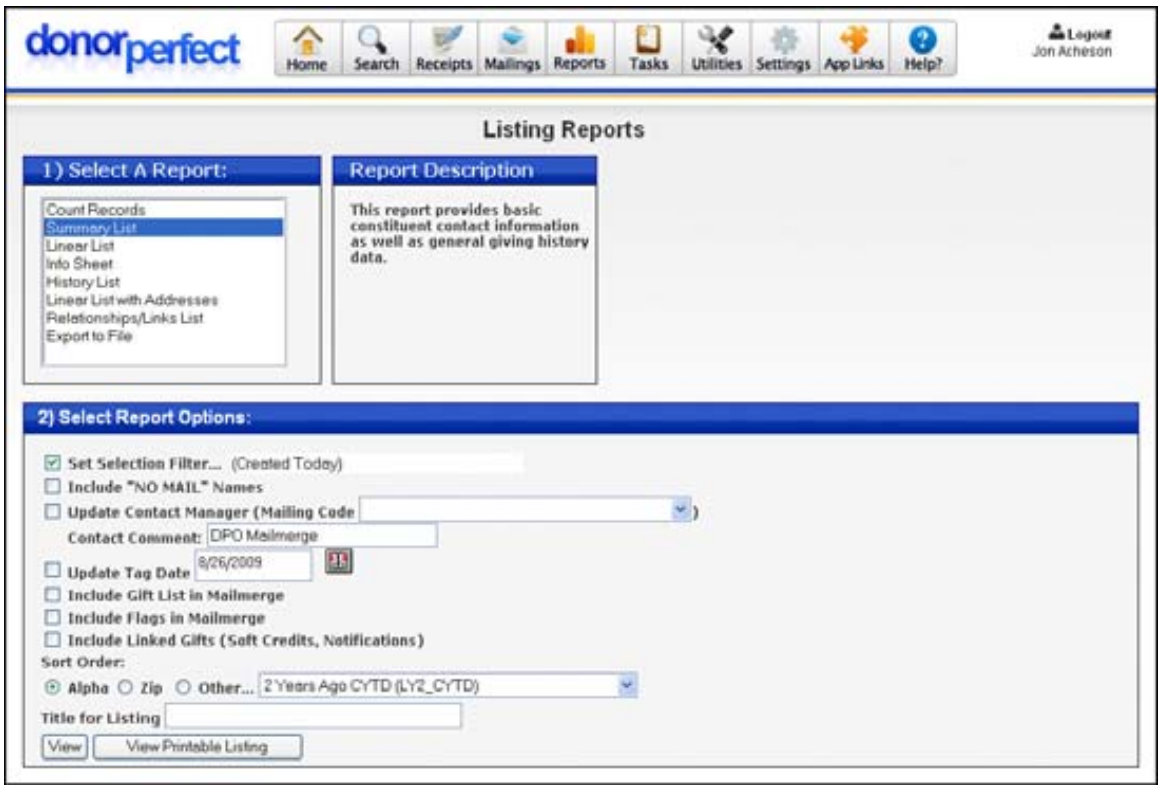
▶ To update your data in DPO

1. Select **Utilities,** and then click **Import Data.**
2. From there, select which table contains the data to be updated. For example to update names, user defined fields, and flags select **dp/dpudf/dpflags**. Updated gifts will go into the **dpgift/dpgiftudf**, etc.
3. Once you have the table selected, browse to find the file from which you want to update.
4. Since you are updating data, select **Update**.
5. Click **Next**.
6. Once the file parses (checks for errors), click **Import,** and the file import will complete.

Once you have begun the import process, do not close your browser window, or attempt to stop the process. To do so may cause data corruption, or partial imports.

Checking Your Data

Once your import is complete, check your data to make sure it did import into the appropriate table, and that no data was dropped. To do this, run a Summary Report, with a filter that will select only the data you have just imported. For example, use a filter that selects all records where the current date matches the Created Date.



When you run this report, you will see a listing of every record you entered. Be sure to select the proper table when you create the filter. If you imported gifts, for example, be sure to select the Created Date out of the Gift table.

Import 2.0

The Import 2.0 module is a sophisticated, powerful new feature of DonorPerfect Online that allows you to import a variety of different types of data into your system.

The following types of data can be imported using Import 2.0:

- Constituent records
- Constituent records combined with transactions: Names & Addresses + Gifts, Names & Addresses + Pledges, Names & Addresses + Contacts, or Names & Addresses + Other Info
- Transaction records (Gifts, Pledges, Contacts, Other Info)
- Codes
- Payment Accounts

Imported records can be inserted into the system as new records, or used to update existing records. You can also insert new records and update existing records all at the same time.

Overview

Import 2.0 Workflow

The workflow for the Import 2.0 process is as follows.

1. **Back Up:** You will want to back up your DPO system before importing data, so that if you make a mistake you will be able to undo the process by restoring from a backup.
2. **File Upload:** Select the data file and the import options you want to use, then upload the data file to your DPO system.
3. **Data Preview:** Preview the incoming data file and verify the fields and contents of the first 100 records.
4. **Field Mapping:** Map the fields in your data file to the fields in the DPO database tables.
5. **Import Data:** Import records from the data file into your DPO system, and run a number of reports on the results of the import. You can also export records to file from this stage.

Import 2.0 Help Sidebar

The **Open For Help** sidebar that runs along the left side of the screen contains specific instructions for each stage of the import process.

To access the help for each screen, click on the **Open For Help** bar on the left side of the screen. The sidebar will expand to display the help for that screen:

To close the Open for Help sidebar, click on the close button located on the right margin of the help bar.

Record Matching

This section explains how the automatic record matching options in Import 2.0 work, and how they interact.

The matching options in Import 2.0 are:

- **Enable Record Matching:** This option attempts to match the incoming records with existing DonorPerfect records based on the contents of the **Name**, **Address**, **City**, **State** and **Zip** fields.
- **Enable Alternate ID Matching:** This option matches records in one of two ways:
  - **Donor ID:** The records are matched based on the Donor ID field.
  - **Alternate ID:** The records are matched based on a user-defined field that you select. The alternate field must have the following properties:
    - It must have **_ID** appended to the end of its name (ex: **UDF_ID**)
    - It must be a text box type field.
    - It must exist in both the import data file and your system.

Insert New Records

If Import 2.0 is set to **Insert New Records**, no matching will be performed. All imported records will be inserted as new records with automatically generated donor IDs.

Update Existing Records

If Import 2.0 is set to **Update Existing Records**, only Alternate ID Matching to Donor ID will be used. If no matching Donor ID is found, an error message will be logged and the record will not be imported.

Insert New and/or Update Existing Records

If Import 2.0 is set to **Insert New and/or Update Existing Records**, the following rules apply:

- If **Alternate ID Matching** is set to **Donor ID**, the system will attempt to match the Donor ID of the record to a Donor ID in the system. If a match is found, the record will be updated. If no match is found, an error message will be logged and the record will not be imported.
- If **Alternate ID Matching** is set to **Alternate ID**:
  - If the import data file contains the Alternate ID field specified, the system will attempt to match the alternate ID field in the record to an alternate ID value in the system. If a match is found, the record will be updated. If no match is found for the alternate ID, an error message will be logged, and the record will not be imported.
  - If the import data file does not contain the Alternate ID field specified, the Record Matching option will be used, if it is enabled. If a match is found, the record will be updated. If no match is found, the import record will be inserted into the system as a new record.

Record Matching Text Pre-Processing

In order to make record matching more efficient, the following operations are performed on a copy of each field, and then the remaining characters are compared to existing records.

- All spaces are stripped and vowels / special characters removed
- In addition the following strings are removed from the Address field:

'Route'	'ST Route'
'Rural Route'	'ST RT'
'Box'	'Highway'
'Post Office'	'PO Drawer'
'APO'	'PO Box'
'State Route'	

These operations do not affect the actual data that is read into the system, they are only used during record matching.

Creating Data Files for Import 2.0

Your data may already be in a comma-delimited MS Excel file (CSV). If it isn't, it should be converted or exported into that format.

Comma Separated Value (CSV) Format

Your Comma Separated Value (CSV) file must conform to the following specifications:

- One line per record.
- The data fields in each line are separated by commas or semicolons:

Value 1,Value 2,Value 3,Value 4,Value Last

or

Value 1;Value 2;Value 3;Value 4;Value Last

- Quotation marks MUST be placed around all text, memo and narrative fields.
- Data in the fields may be upper or lower case, and may contain spaces, hyphens, or dashes. Fields may not contain commas, quotation marks, or hard returns.
- The first line must contain a header record with the field names of the source information listed in each field. The data begins in the second line. You can find a list of field names for each table in Appendix E.
- We recommend you set the file extension to **.CSV**.

In general, data files created in Microsoft Excel and exported to **.CSV** are fine, as long as the rules listed above are obeyed.

Additional Issues

There are a few important things to keep in mind:

- If a required field is missing (such as **donor_ID**), the import will not complete.

- If you are inserting records, and an incoming record contains a **donor_ID** field, if the **donor_ID** matches an existing **donor_ID** in the system, that record will not be imported because Import 2.0 will not create a duplicate record.
- You can only have one instance of each field name in the column headers of the import data file. If a field name appears more than once in the column headers of an import data file, an error will be triggered.

Including Flag Information in Import 2.0 Data Files

You can include flag information in Import 2.0 data files by following the procedures below:

- Add a special column/field to the data file for the flag. The name of the field in the column headers must be in the following format:

  flag@@*[code]*

  where *[code]* is the code associated with the flag in your DPO system.
- To flag a record, put a capital X in the field.
- Import 2.0 allows you to flag a record, but does not allow you to "un-flag" a record.

For example, if you wanted to import data for the flags **AZ** and **BD**, your data might look like this:

L	M
flag@@AZ	flag@@BD
X	X
	X
X	
X	
X	
X	

Including User-Defined Multi-Value Fields in Data Files

You can include data for user-defined multi-value fields in Import 2.0 data files by obeying the following rules:

- Add a special column/field to the data file for each value in the multi-value field. The name of the field in the column headers must be in the following format:

  [fieldname]@@[code]

  where ***[fieldname]*** is the name of the user-defined multi-value field, and ***[code]*** is the code for the value in the multi-value field. You will wind up with a set of fields in each record, each of which represents one of the values from the multi-value field.
- To check the value for a record, put a capital X in the field for that value.

- Import 2.0 allows you to check a value in a multi-value field, but does not allow you to "un-check" a value.

For example, if you have a multi-value field named **options**, and two values in that field that can be selected for a donor, **aaa** and **ccc**, your data might look like this:

N	O
options@@aaa	options@@ccc
X	X
X	X
	X
X	X
X	
X	X
X	X

Importing Alternate Addresses

Alternate Address is now available as a record type when **Insert New Records** or **Update Existing Records** is selected as the type of import. Details are as follows:

- Insert New Records:
  - **Donor_id** must be mapped and populated for all records
  - If the **donor_id** is found in the import record, Import 2.0 will create a new **dpaddress** record for that **donor_id**. If the **donor_id** is not found in the system, it will be added as a new donor, then the **dpaddress** record will be added.
  - If the **donor_id** is not found in the import record, the following error message is triggered: "Column donor_id does not allow nulls."
- Update Existing Records:
  - **dpaddress.address_id** must be mapped and populated for all records
  - If **address_id** is found in the import record, Import 2.0 updates the respective address record
  - If **address_id** is not found in the import record, the following error message is triggered: "Column address_id does not allow nulls."

Imports and the Gift Aid R68 Report

If the Gift Aid R68 Report is activated, the following rules are obeyed:

- NULL values are not permitted.
- When importing a new donor record, if the **gift_aid_eligible** field is not mapped, the resulting donor record will be **gift_aid_eligible = 'N'**.
- When importing a new gift record, if the **gift_aid_eligible_g** field is not mapped, the resulting gift will pull the **gift_aid_eligible** value from the main record (similar to **dpgift.receipt_delivery_g**).

- Permitted values for **gift_aid_eligible** and **gift_aid_eligible_g** are **Y/N** only.

Importing Data

This chapter explains how to import your data file using Import 2.0.

Backing Up Your System

Warning! It is strongly recommended that you back up your system before importing data. This will allow you to undo the effects of the import, if desired, by restoring to the previous backup.

See "Backup and Restore" in the *DonorPerfect Online User Manual* for details on backing up and restoring your system.

First Time Welcome Pop-Up

The first time you access the Import 2.0 module, a pop-up screen will appear, offering to let you watch the Quick Start training video.

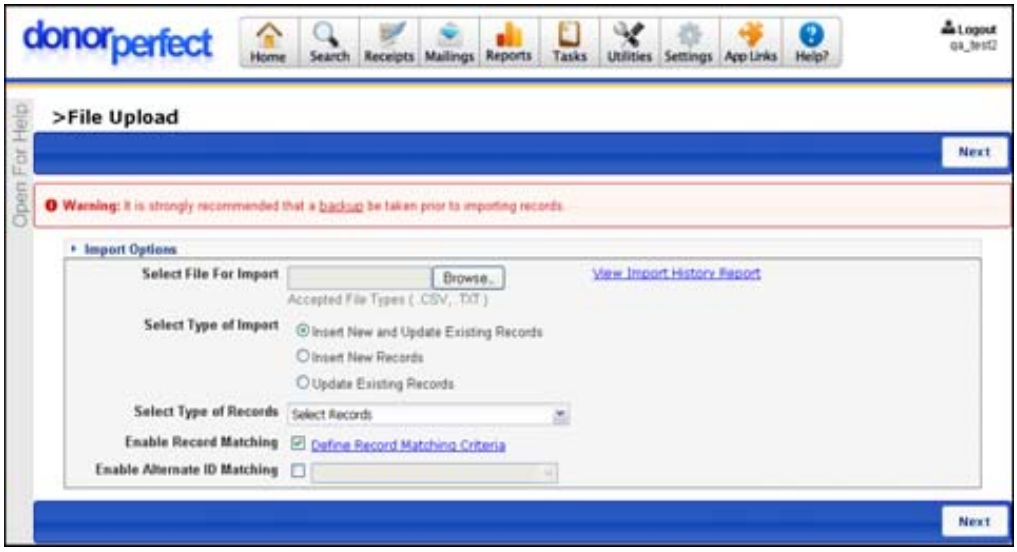
Once you upload a file to DonorPerfect using Import 2.0, this pop-up message will no longer appear. The Quick Start training video is also available from the Help sidebar.

File Upload

The File Upload screen is the first screen of the Import 2.0 module. This is where you specify the import data file, and also select a number of important options related to the type of file that it is.

▶ To specify the import data file, along with other import options

1. From the navigation bar, click on the **Utilities** button, and then select **Import 2.0**. The File Upload screen will appear:



2. Set the **Select File for Import** field to the filename of the import data file:

   a. Click the **Browse** button next to the field.

   b. In the File Upload screen that appears, select the import data file and click the **Open** button.

3. Under **Select Type of Import**, select one of the following options:

   - **Insert New and/or Update Existing Records:** If a record from the import file already exists in the system, it will be updated. If the record does not already exist in the system, a new record will be created.
   - **Insert New Records:** Records from the import file that do not exist in the system will be created. If a record from the import file already exists in the system, an error message will be logged and no record will be created.
   - **Update Existing Records:** Records from the import file that match existing records in the system will be used to update the matching records. If a record does not match an existing record in the system, an error message will be logged, and no record will be created.

4. Set **Select Type of Records** to the tables that you want to populate with data from the import data file.

> Note: The contents of the Select Type of Records list will change based on the Select Type of Import setting. Only those combinations of tables that are allowed for the type of import selected will be displayed. See "Appendix H: Illegal Import Options" for details on which import options are illegal for each type of import.

5. If **Select Type of Import** is set to **Insert New and/or Update Existing Records**, the **Enable Record Matching** option will be enabled. This function is used to match the records from the import data file with records that are already in the system, so that Import 2.0 can update an existing record if it matches an

imported record. Check this option to enable record matching, or leave the option unchecked to disable record matching.

Warning! If you do not check **Enable Record Matching**, Import 2.0 may be unable to update existing records. If Constituent Matching is unable to be used because of a missing Donor ID or Alternate ID, Import 2.0 uses the record matching function to match the imported records to the existing records.

6. If **Enable Record Matching** is checked, the **Define Record Matching Criteria** link will appear to the right of the check box:

This link allows you to select which fields will be used to determine whether records from the import data file match existing records:

a. Click the **Define Record Matching Criteria** link. The Record Matching Criteria screen will appear:

b. Check the fields that you want to use to match records. You can also select the number of characters starting from the beginning of the field that will be used to compare the two fields. Leading and trailing spaces will be eliminated before comparing field contents.

c. If you want to disable record matching from within this screen, clear the **Record Matching** checkbox at the top of the screen.

d. Click the **OK** button to save your record matching settings and return to the File Upload screen.

7. If **Type of Import** is set to **Insert New and Update Existing Records**, the **Enable Alternate ID Matching** option will be enabled. If this option is not checked, the **Donor ID** field will be used to match imported records with

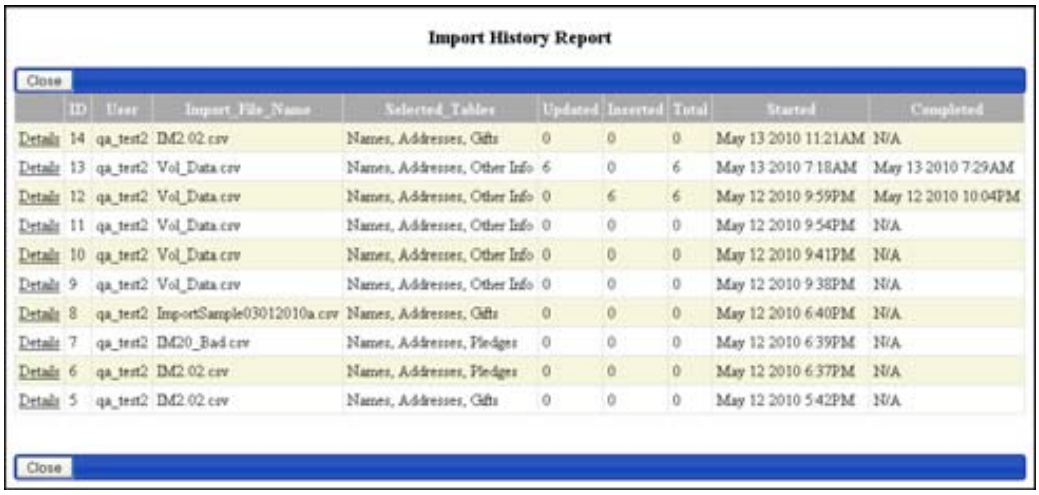
constituents. If it is checked, you can select a user-defined field to use to match import records to constituents from the list next to the checkbox.

8. Once you have made all the selections on this screen, click the **Next** button at the top or bottom of the screen to upload the data file to DonorPerfect Online and proceed to the Data Preview screen.

> Note: The data file will be uploaded to DonorPerfect Online, but the contents of its records will not be loaded into your system's data tables until later in the import process.

Import History Report

Clicking the **View Import History Report** link on the File Upload page will cause the Import History Report to open in a new browser window.



Import History Report

Close

	ID	User	Import_File_Name	Selected_Tables	Updated	Inserted	Total	Started	Completed
Details	14	qa_test2	IM2.02.csv	Names, Addresses, Gifts	0	0	0	May 13 2010 11:21AM	N/A
Details	13	qa_test2	Vol_Data.csv	Names, Addresses, Other Info	6	0	6	May 13 2010 7:18AM	May 13 2010 7:29AM
Details	12	qa_test2	Vol_Data.csv	Names, Addresses, Other Info	0	6	6	May 12 2010 9:59PM	May 12 2010 10:04PM
Details	11	qa_test2	Vol_Data.csv	Names, Addresses, Other Info	0	0	0	May 12 2010 9:54PM	N/A
Details	10	qa_test2	Vol_Data.csv	Names, Addresses, Other Info	0	0	0	May 12 2010 9:41PM	N/A
Details	9	qa_test2	Vol_Data.csv	Names, Addresses, Other Info	0	0	0	May 12 2010 9:38PM	N/A
Details	8	qa_test2	ImportSample03012010a.csv	Names, Addresses, Gifts	0	0	0	May 12 2010 6:40PM	N/A
Details	7	qa_test2	IM20_Bad.csv	Names, Addresses, Pledges	0	0	0	May 12 2010 6:39PM	N/A
Details	6	qa_test2	IM2.02.csv	Names, Addresses, Pledges	0	0	0	May 12 2010 6:37PM	N/A
Details	5	qa_test2	IM2.02.csv	Names, Addresses, Gifts	0	0	0	May 12 2010 5:42PM	N/A

Close

The Import History Report lists all of the imports that have been run on your system. If the number of imports is great enough, they will be split up into pages.

Clicking on the **Details** link for an import will display a more detailed view of the import, listing the number of records inserted/updated into each DonorPerfect Online table.

Import History Report

Close Back

ID	Table_Name	Updated	Inserted	Total
13	dp	6	0	6
13	dpoff	0	0	0
13	dpotherinfo	0	6	6
13	dpotherinfooff	0	6	6

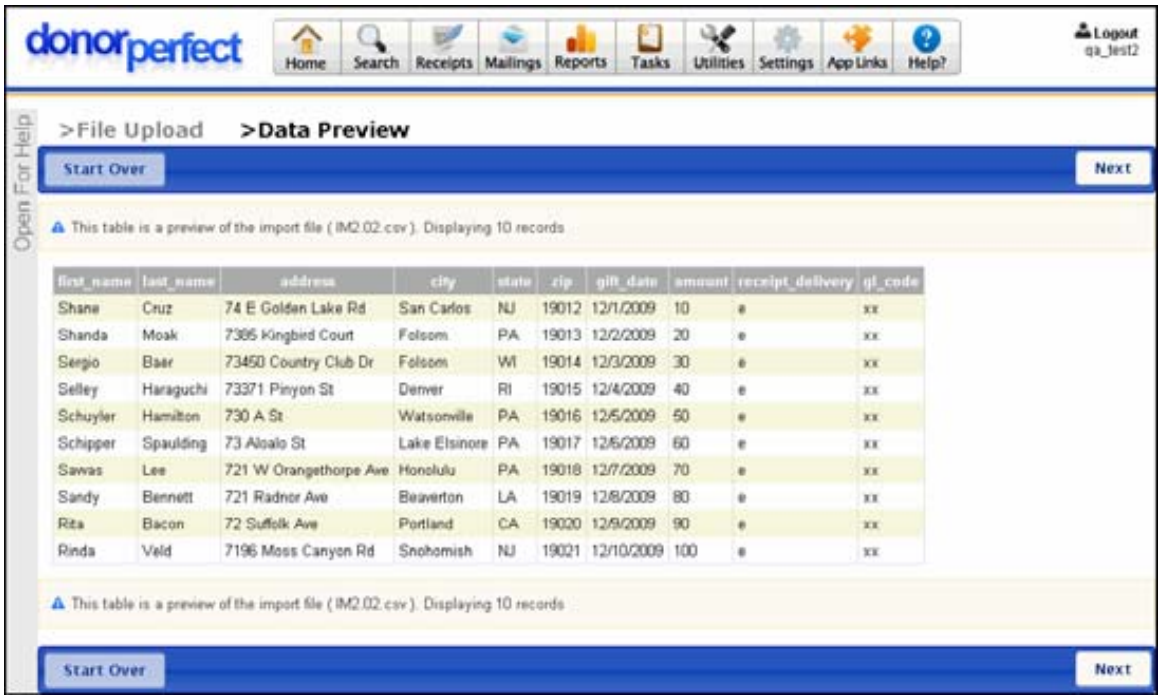
Invalid Records Count: 0

Close Back

Click the **Back** button to go back to the previous page, or click the **Close** button to close the Import History Report and return to the File Upload page.

Data Preview

Once you click the **Next** button on the File Upload screen, the data file is uploaded to DonorPerfect Online, but is not yet imported into the system. The Data Preview page displays:



The Data Preview page is intended to allow you to preview your import file. Only the first 100 records in the data file will be displayed.

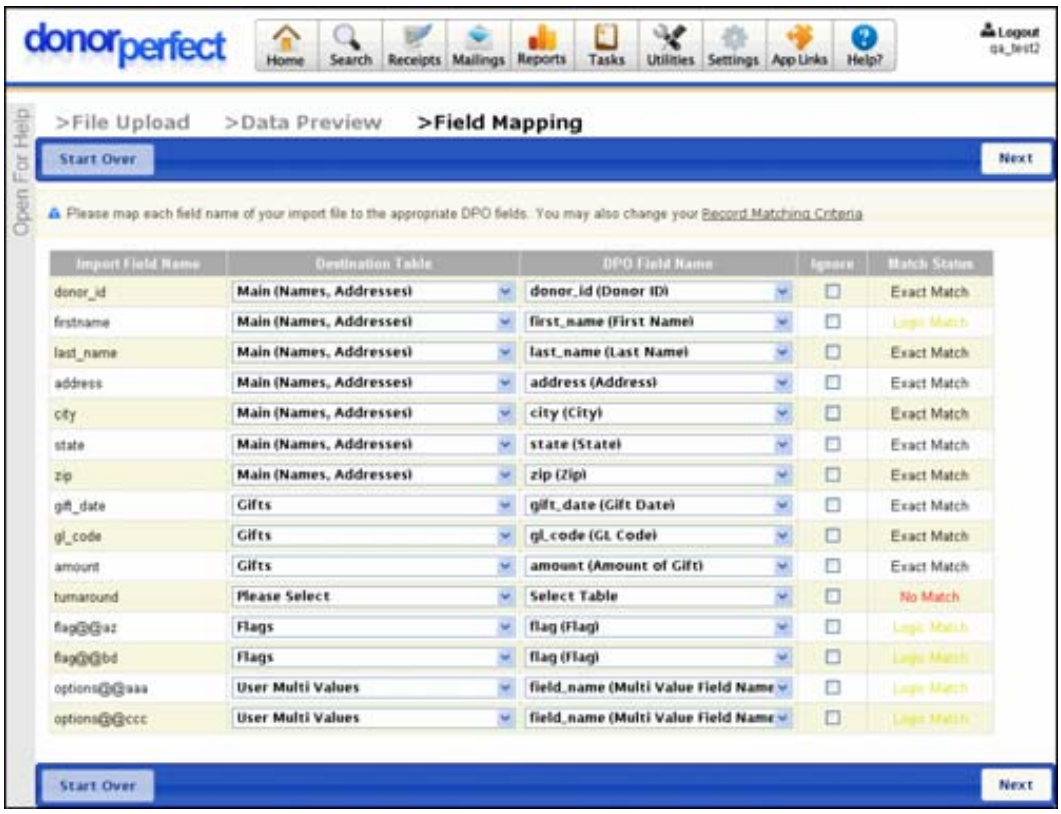
The two things you should check in this screen are:

- Are all of the essential fields populated with data?
- Are they populated with the *correct* data, or are there fields that obviously contain the wrong type of data?

If the data preview reveals problems, click the **Start Over** button to restart the Import 2.0 process once you correct the problem with your data file.

If everything looks good, click the **Next** button to proceed to the Field Mapping screen.

Field Mapping



Once you click on the **Next** button in the Data Preview page, the Field Mapping page appears. The Field Mapping screen is where you map the fields in your import data file to the fields in your system. Only the fields from the tables selected in the File Upload screen are available on the system side.

Import 2.0 will attempt to automatically match up the fields in your data file to the fields in the system based on the field name. The results of the automatic matching are displayed in the **Match Status** column:

Exact Match	The field name was an exact match to a field name in your system.
Logic Match	The field name was matched to a field name in your system using a fuzzy logic match based off a list of possible alternative spellings and misspellings.
No Match	No match was found for the field. The Destination Table and DPO Field Name selections will be set to Select Table.
User Match	The field matching was manually set by the user.

Thanks to automatic mapping, you simply have to correct the mapping if a different field was selected than you would prefer, and handle the remaining fields that could not be automatically mapped.

▶ To map a fields in the import data file to a field in your system

1. Select the **Destination Table** that contains the field in your system you want to map the import field to.

2. Select the **DPO Field Name** of the field in your system that you want to map the import field to. The fields in the **DPO Field Name** list are automatically set to match those in the **Destination Table**.
3. To ignore a field from your import data file when importing data, check the **Ignore** box. Ignored fields are not read from the import data file: it is as if you deleted them from the import file.

Important! All of the fields in the import data file must be either mapped to a field in the system, or set to Ignore. Failure to do so will trigger an error message.

If there are missing fields or other critical problems, you may want to click the **Start Over** button, rebuild your import data file, and begin the import process again.

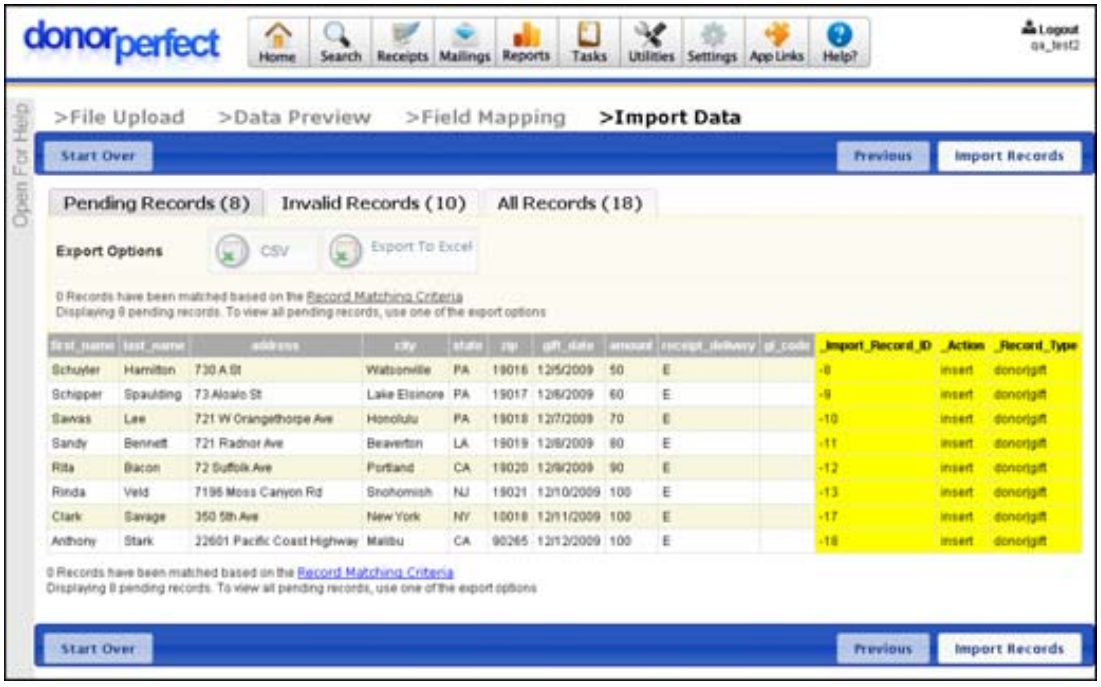
Once you have set up the field mapping to your liking, click the **Next** button to proceed with the Validation phase of the Import process.

Validation

Once the **Next** button is clicked in the Field Mapping screen, Import 2.0 will validate the data in the data file. If serious problems are discovered, such as fields that are not mapped and not set to **Ignore**, you will be returned to the Field Mapping screen to correct the issues. Otherwise, you will automatically continue on to the Import Data screen.

Import Data

The Import Data screen displays the results of the validation testing that was done after you clicked the **Next** button in the Field Mapping screen. You can examine the results of the validation, export the records from each category, then import the pending records into your DonorPerfect Online system.



Note: Only the first 100 records will be displayed in each tab. To view all of the records in the import data file, use the Export to File feature of this screen and view the exported file in a spreadsheet or some other program.

Viewing Validation Results

The Import Data screen displays the results of the validation testing by listing the records from the import data file on the following tabs:

- **Pending Records:** the records that passed validation
- **Invalid Records:** the records that failed one or more of the validation tests
- **All Records:** the complete list of all records from the import data file.

Note: If all of the records in the import data file fail the verification tests, the Import Records button will be replaced by a button that says Previous, and will take user back to the Field Mapping screen.

Pending Records

first_name	last_name	address	city	state	zip	gift_date	amount	receipt_delivery	gl_code	_Import_Record_ID	_Action	_Record_Type
Schuyler	Hamilton	738 A St	Watsonville	PA	19016	12/5/2009	50	E		-8	insert	donor|gift
Schipper	Spaulding	73 Alcalo St	Lake Elsinore	PA	19017	12/6/2009	60	E		-9	insert	donor|gift
Sawas	Lee	721 W Orangethorpe Ave	Honolulu	PA	19018	12/7/2009	70	E		-10	insert	donor|gift
Sandy	Bennett	721 Radnor Ave	Beaverton	LA	19019	12/8/2009	80	E		-11	insert	donor|gift
Rita	Bacon	72 Suffolk Ave	Portland	CA	19020	12/9/2009	90	E		-12	insert	donor|gift
Rinda	Veld	7196 Moss Canyon Rd	Snohomish	NJ	19021	12/10/2009	100	E		-13	insert	donor|gift
Clark	Savage	350 5th Ave	New York	NY	10018	12/11/2009	100	E		-17	insert	donor|gift
Anthony	Stark	22601 Pacific Coast Highway	Malibu	CA	90265	12/12/2009	100	E		-18	insert	donor|gift

0 Records have been matched based on the Record Matching Criteria
Displaying 0 pending records. To view all pending records, use one of the export options

The Pending Records tab lists the first 100 records that passed validation. The type of action that will be performed, as well as the type of records that will be inserted or updated are listed in yellow after each record listing.

Note: Yellow columns indicate information that has been added by Import 2.0, instead of data from the import data file.

Invalid Records

The **Invalid Records** tab lists the first 100 records that failed one or more validation tests. The details of the errors that caused the records to fail validation are listed in yellow at the end of each record.

All Records

The All Records tab lists all of the records from the import data file. It is basically a combination of the **Pending Records** and **Invalid Records** tabs.

Exporting Records to File

There are two buttons at the top of each of the tabs in the Import Data screen. These tabs allow you to export records in the following formats:

- The **CSV** button allows you to export records in a comma-separated value format. This format can be easily imported into spreadsheets. It can also be imported back into Import 2.0.
- The **Export to Excel** button exports records into an Excel spreadsheet.

The records that will be exported to the file will vary depending on which tab you are in:

- If you export records from the **Pending Records** tab, all pending records will be exported to the file.
- If you export records from the **Invalid Records** tab, only the invalid records will be exported.
- If you export records from the **All Records** tab, all of the records in the import data file will be exported.

Editing & Re-Validating Invalid Records

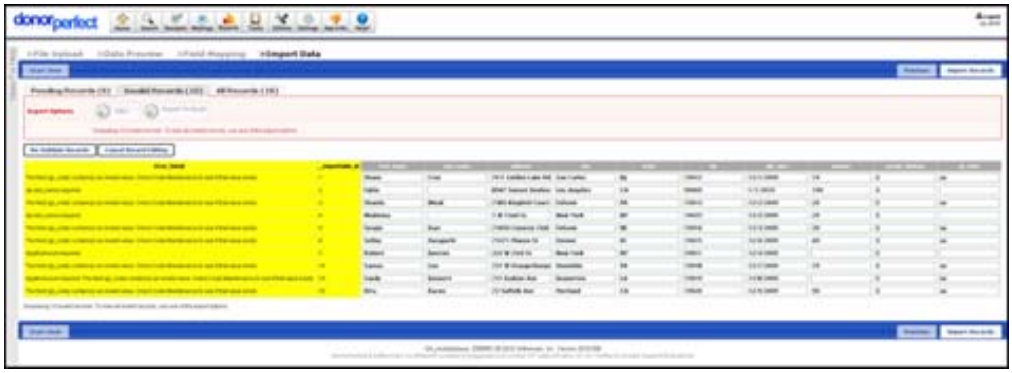
Import 2.0 allows you to manually edit the problematic fields for your invalid records, then re-validate them. If the records pass validation the second time through, they are added to the list of Pending Records, to be imported in the next step.

Tip: If there are a large number of invalid records, you may want to export them to a file and correct them offline, then re-import them. See "Exporting, Correcting and Re-Importing Invalid Records" on page 345 for details.

▶ To edit and re-validate invalid records

1. Click the **Invalid Records** tab of the Import Data screen.

2. Click the **Edit Invalid Records** button located below the **Export Options** area. The fields of the invalid records will become editable, and the **Edit Invalid Records** button is replaced by the **Re-Validate Records** button, and the **Cancel Record Editing** button.



3. Edit the data in the invalid records to correct the problems that prevented the records from being validated.

Note: The error message for each of the invalid records appears in the Error_Detail field (the leftmost yellow field).

4. If for some reason you need to quit editing the invalid records, click the **Cancel Record Editing** button. The **Invalid Records** tab will go back to normal, and any changes you have made will be cancelled out.
5. Once you have corrected the invalid records, click the **Re-Validate Records** button. The records from the **Invalid Records** tab will go through the validation process a second time:
   - Those records that pass validation this time will be added to the list of Pending Records in the **Pending Records** tab.
   - Those records that fail a second time will remain in the **Invalid Records** tab, which will go back to its default state.

You can re-edit and re-validate the records in the **Invalid Records** tab as many times as you want.

Exporting, Correcting and Re-Importing Invalid Records

Records that were marked as Invalid will not be imported into the DonorPerfect Online system when the Import Records button is clicked. It is possible to export them to a file, fix the records, and re-import them, however.

▶ To correct and re-import invalid records

1. From either Import Data screen, export the invalid records to a **.CSV** file.
2. Open the **.CSV** file up in a spreadsheet or similar application and correct the issues with the various records.

Note: The error message for each of the invalid records should appear in the last field of the exported file record.

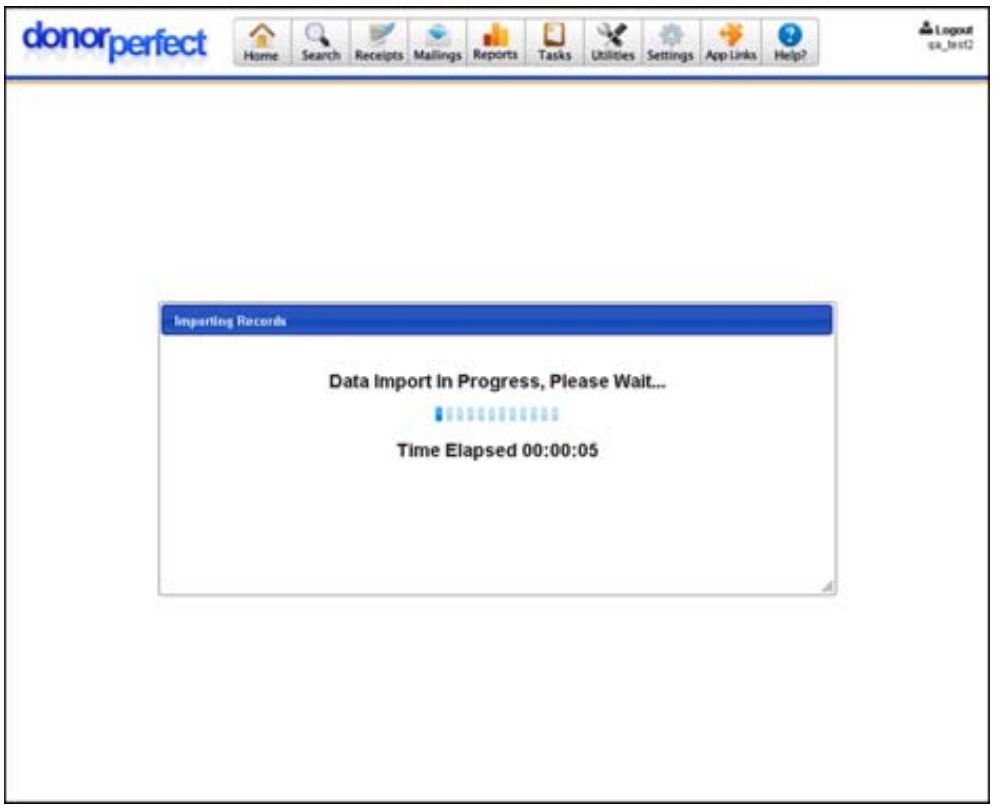
3. Save the **.CSV** file, making sure that it remains a **.CSV** file, and not a spreadsheet file.
4. Import the **.CSV** file into DonorPerfect Online a second time. Assuming that all of the issues with the records were corrected, the records that were formerly Invalid should now pass validation and become Pending records that you can now import into your system.

Importing the Pending Records

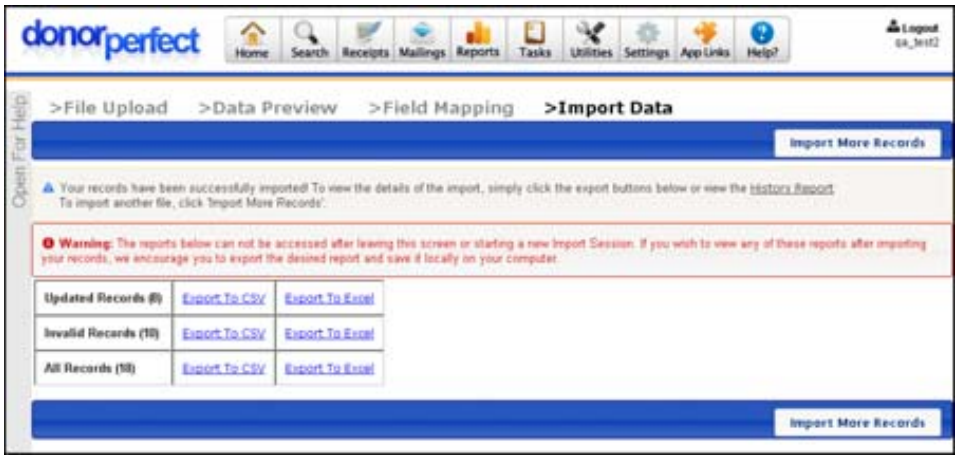
The **Import Records** button allows you to import the pending records from the import data file into your DonorPerfect Online system. Only the records listed as Pending will be imported.

▶ To import the pending records into your system

1. Click the **Import Records** button. An Importing Records message will display:



Once the import process is complete, a new Import Data screen will display:



As in the first Import Data screen, you can click on the links provided to download the updated records, or the invalid records, or all of the records from the import data file, and store them in a **.CSV** or Excel file.

Undoing a Data Import

If you discover after importing a set of records that there was a problem with the data, or some other issue that you want to undo, you can restore your system to its previous state by restoring from the system backup that you made before you imported the data.

See "Backup and Restore" in the *DonorPerfect Online User Manual* or in the online help.

Import 2.0 Examples

Example #1

You are importing a file with some records requiring update (these will contain Donor ID) and some to be inserted (these will have no Donor ID). There are several records in your file with the same first and last names and there are records contained in the database with similar or identical names as the records slated for insert.

▶ Import 2.0 settings:

- Set **Type of Import** to **Insert New and/or Update Existing Records**
- Check **Enable Record Matching**
- Set **Record Matching Criteria** to **Last Name** and **First Name** only
- Do not check **Enable Alternate ID Matching**

▶ Results:

- Records with Donor ID's will be updated.

  If the Donor ID does not match an ID in the database the update will fail with an explanatory message.

- Records with blank ID's will be inserted as new, provided **dp.last_name** is present for the respective record.

  An exception to the insert process will occur if a record in the input file matches the first and last name of a record already in the database: in this case the system will update the first instance (lowest Donor ID) that matches the 'Record Matching Criteria' the user selected.

Example #2

You are importing a file with some records requiring update and some to be inserted. Again, there are several records in your file with the same first and last names and there are records in the database with similar or identical names as the records slated for insert.

▶ Import 2.0 settings:

- Set **Type of Import** to **Insert New and/or Update Existing Records**
- Set **Enable Record Matching** to **Yes**
- Set **Record Matching Criteria** to **Last Name**, **First Name**, **Address**, **City**, **State** and **Zip**
- Do not check **Enable Alternate ID Matching**

▶ Results:

- Records with Donor ID's will be updated.

  If the Donor ID does not match an ID in the database the update will fail with an explanatory message.

- Records with blank ID's will be inserted as new, provided **dp.last_name** is present for the respective record.

  An exception to the insert process will occur only if the system has matched the first name, last name, address, city, state and zip to a record already in the database: in this case it will update the existing record.

Setting the Matching Criteria to cover name, address, city, state and zip greatly reduces the possibility of duplicate records being created.

Record matching is only performed for file records where no donor ID is given. It is never performed when a Donor ID exists on the incoming record.

Example #3

You are importing a file with some records requiring update and some to be inserted. You are sure no records are identical to records already contained in your database.

▶ Import 2.0 settings:

- Set **Type of Import** to **Insert New and/or Update Existing Records**
- Set **Enable Record Matching** to **No**
- Do not check **Enable Alternate ID Matching**

▶ Results:

- Records with Donor ID's will be updated.

  If the Donor ID does not match an ID in the database the update will fail with an explanatory message.

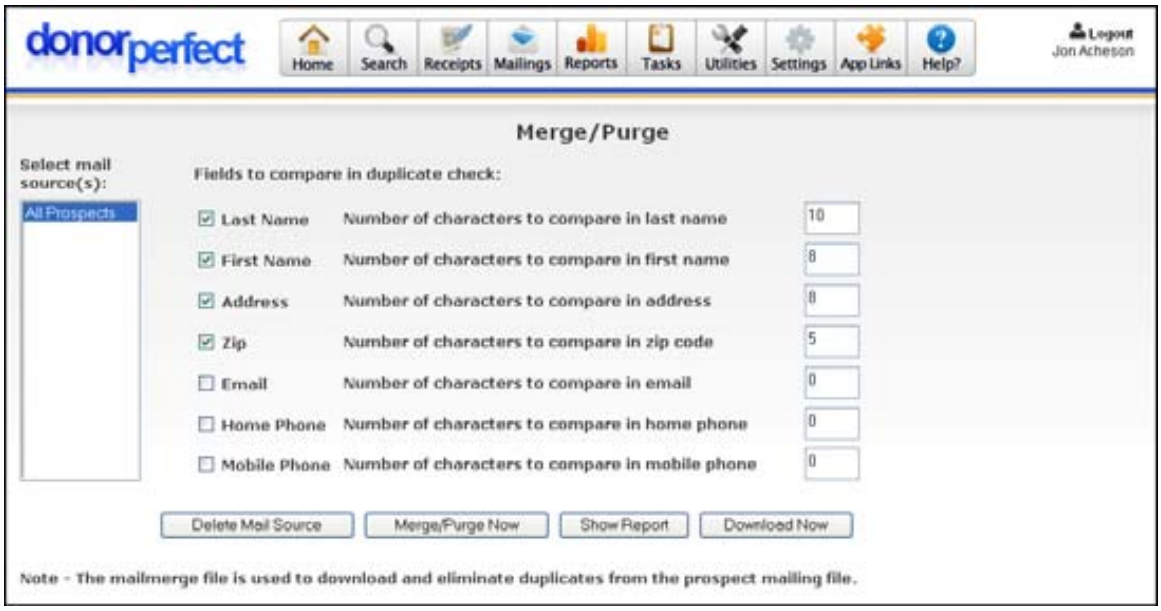
- All file records with blank ID's will be inserted as new, provided **dp.last_name** is present for the respective record.

Merge Purge

The Merge Purge feature allows for the removal of duplicate names from the combination of your internal mailing names and any additional prospect mailing lists that are acquired or purchased. It is available as an additional module; contact your sales representative.

For example, if your donor list has 50,000 records and you purchase an additional list of 100,000 prospect records, you would now be able to mail information to a total of 150,000 people. However, from the 100,000 records that were additionally purchased, 20,000 of them already appear on your original list. Normally, you would not be able to tell if there were duplicates and would waste money by mailing information twice to a large number of names; in this case, 20,000.

With the use of the Merge Purge feature in DonorPerfect Online, no information will be mailed twice to the same person, saving you money. The way it works is that it compares your mailing list and any additional mailing lists. It looks at the last name, address, and zip code fields and will find the duplicates that exist between them.



To access the screen, from the navigation bar click on **Utilities** then click on **Merge Purge**.

Note Contact DPO Support to upload the file.

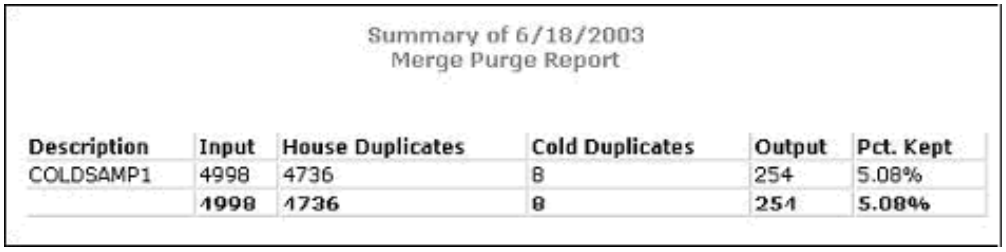
Merge Purge – Main Screen Field Descriptions

The following fields are on the Merge/Purge screen.

- **Select mail source:** choose the mailing list you want to merge and purge.
- **Fields to compare in duplicate check:** Click on the desired comparison method and then enter the number of characters you want to compare for the method you choose. The available comparison methods are Last Name, First Name, Address, Zip, Email, Home Phone, or Mobile Phone.
- **Merge/Purge Now:** DPO will perform the selected merge purge from your list of prospects.
- **Show Report:** View the summary report of a merge purge that was last run. The report shows the following information:
  - **Description:** Description of the mail source file that is being used.
  - **Input:** The total number of records that appear in the mail source file.
  - **House Duplicates:** The number of records from the specific mail source file that already appear in the DPO system. In this case, 4736 records out of the 4998 records from the Coldsamp1 file already exist in DPO.
  - **Cold Duplicates:** The number of duplicate records that exist in the actual mail source file. In this case, there are 8 duplicate records in the 4998 records that exist in the Coldsamp1 file.

- **Output:** The number of records imported minus the sum of all duplicate records (house and cold). In this case, 4998 – (4736 + 8) = 254.
- **Pct. Kept:** The percentages that were outputted divided by the number of records that were inputted. In this case, 254/4998 = 5.4 %

- **Download Now:** Download the mail house file into Microsoft Excel, or any other program.



Summary of 6/18/2003
Merge Purge Report

Description	Input	House Duplicates	Cold Duplicates	Output	Pct. Kept
COLDSAMP1	4998	4736	8	254	5.08%
	4998	**4736**	**8**	**254**	**5.08%**

Recalculations

The Recalculate screen allows you to recalculate gift totals, pledge balances, and delinquent amounts.

Recalculate Gift Totals

This function recalculates the fields that are automatically calculated by DonorPerfect (year-to-date, number of gifts, grand total giving, etc.). This option needs to be run at the start of the new fiscal year and on those rare occasions when the calculated fields do not appear to be correct.

▶ To recalculate gift totals

1. Click **Utilities**, click **Recalculate**, and then click **Recalculate Gift Totals**.
2. Click **OK** at the System Verification Message.

Recalculate Pledge Balances and Delinquent Amounts

This function recalculates the balances and delinquent amounts of all pledges in the system. The balance for a pledge record is calculated based on the total pledge amount minus all gift records that are linked to that pledge, minus the write-off amount. The Delinquent amount for a pledge record is calculated by subtracting the total amount of payments made from the total amount that should have been paid since the start date of the pledge. This option needs to be run on those rare occasions when the calculated fields do not appear to be correct.

▶ To recalculate pledge balances and delinquent amounts

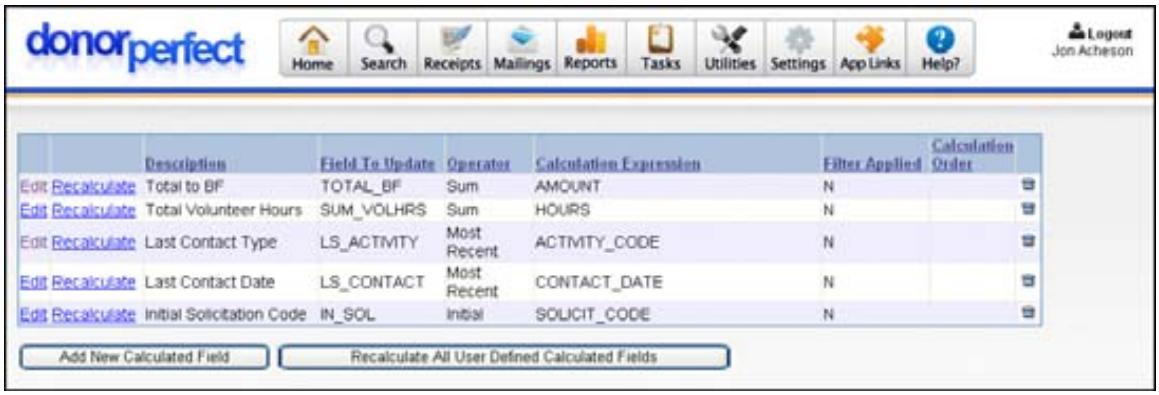
1. Click **Utilities**, click **Recalculate**, and then click **Recalculate Pledge Balances and Delinquent Amounts**.
2. Click **OK** at the System Verification Message.

10. Configuring Settings

The Settings menu allows you to configure the following settings:

- Calculated Fields (see page 351)
- Code Maintenance (see page 357)
- Defaults (see page 361)
- Export Templates (see page 362)
- Filters (see "Using Selection Filters" on page 159)
- Order Management (see page 366)
- Parameters (see page 377)
- Receipt Numbers (see page 392)
- Screen Designer (see page 393)
- SmartActions (see page 396)
- User Security (see page 412)

Calculated Fields



The Calculated Fields module allows you to perform calculations that would be difficult to do by other means, such as:

- What was the initial solicitation that each donor responded to when they made their first donation?
- What was the most recent pledge payment by each donor?
- What was the largest donation by each donor to a certain fund?
- What is the total number of volunteer hours worked by each donor?

For all of these calculations, you are basically performing an operation on the contents of one field, such as "Compute a Sum" or "Find the Maximum Value," and writing the result into another field.

The Calculated Fields screen also allows you to edit calculated fields, and force recalculation of the calculated fields.

Note: If you plan to store the result of a calculation in a user-defined field, you should create that field first before you set up the calculation. See "Screen Designer" on page 393 for details on creating user-defined fields.

Aggregate vs. Individual Calculations

There are two types of calculated fields that can be created: Aggregate fields and Individual Fields.

Aggregate Calculated Fields

Aggregate calculated fields perform some kind of operation on a set of records belonging to a given donor. Aggregate operations are carried out on transactional data such as Gift records, Pledge records, Contact records, and Other Info.

Typical aggregate calculations might include:

- The sum of all donations for each donor that pass a selection filter
- The average of all donations for each donor that pass a selection filter
- The date of the most recent pledge made by a donor
- The sum of all volunteer hours worked by each donor

Individual Calculated Fields

Individual calculated fields perform a calculation or operation based on the fields within a single record. For instance, you might use an individual calculation to subtract the Fair Market Value of a gift from the Amount of that same gift.

Combining Individual and Aggregate Calculations

It is possible to set up an individual calculation to work with the results of one or more aggregate calculations. For instance, you might do the following:

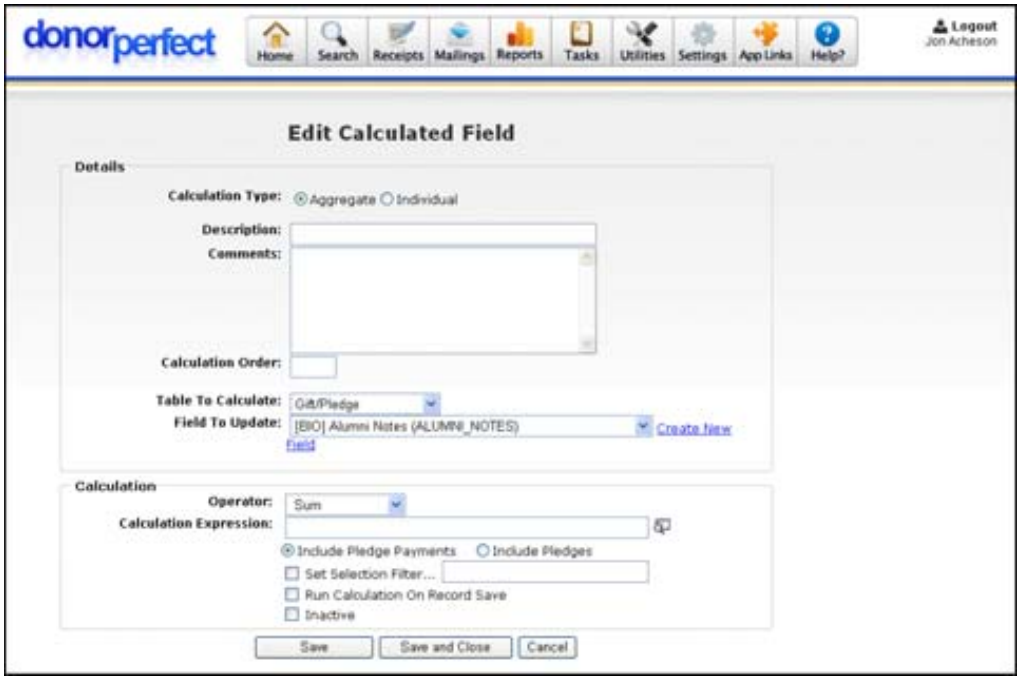
1. Set up an aggregate field to calculate the sum of all pledges for a donor during the previous year and store the result in the main donor record.
2. Set up a second aggregate field to store the sum of all donations for a donor during the previous year and store the result in the main donor record.
3. Set up an individual field to calculate the difference between the two.

Adding a New Calculated Field

▶ To add a calculated field

1. From the navigation bar, select **Settings** and then select **Calculated Fields**.

Click the **Add New Calculated Field** button.



2. Set **Calculation Type** to **Aggregate** or **Individual**.
3. Enter a brief description of the calculated field in the **Description** field, such as **Most Recent Pledge Payment**, or **Initial Solicitation**.
4. If desired, you can enter a more lengthy description of the calculation into the **Comments** field.
5. If desired, enter an integer into the **Calculation Order** field to force this field to be calculated either before or after some other calculated field.

   Fields are calculated starting with the number 1 and counting up. There is no upper limit on the number that can be entered. If no number is entered, the field will be calculated after all the numbered fields.
6. Set **Table to Calculate** to the table containing the fields used by your calculation.
7. Set **Field to Update** to the field that will store the result of your calculation.

Warning! If you write the result of your calculation to a field that already contains other information, that information will be overwritten and destroyed. To avoid this, set Field to Update to a user-defined field that you know is safe to write to.

To create a new user-defined field to store the calculation result in, click the **Create New Field** link. See "Screen Designer" on page 393 for details on creating user-defined fields.

8. If you are creating an **Aggregate** calculated field, set **Operator** to an aggregation operation to perform on the field referenced in the **Calculation Expression** field. (This field does not appear for Individual calculated fields.)

   The available operations are:

Operation	Description
Sum	DPO will go through all the records for each donor in the Table to Calculate table, and add up all the values for the Calculation Expression. The total for each donor will be written to the Field to Update field.
Average	DPO will go through all the records for each donor in the Table to Calculate table, and calculate an average of the values of the Calculation Expression. The average for each donor will be written to the Field to Update field.
Maximum	DPO will go through all the records for each donor in the Table to Calculate table, and find the maximum value of the Calculation Expression among all of the records. The maximum value for each donor will be written to the Field to Update field.
Minimum	DPO will go through all the records for each donor in the Table to Calculate table, and find the minimum value of the Calculation Expression among all of the records. The minimum value for each donor will be written to the Field to Update field.
Count	DPO will count up the number of records for each donor in the Table to Calculate table. The number of records for each donor will be written to the Field to Update field. If a selection filter is in place, only the records selected by the filter will be counted.
Initial	DPO will find the first record that was entered for each donor in the Table to Calculate table. The value of the Calculation Expression for that record will be written to the Field to Update field for each donor.
Most Recent	DPO will find the last record that was entered for each donor in the Table to Calculate table. The value of the Calculation Expression for that record will be written to the Field to Update field for each donor.
Most Frequent	DPO will find the value of the Calculation Expression that occurs most frequently for each donor in the Table to Calculate table. That value will be written to the Field to Update field for each donor.

Note: If Table to Calculate is set to Main/Bio, the Operator list will not be displayed. This is because Main/Bio has only one record for each donor, so there is nothing to aggregate. If Main/Bio is selected, the value of the Calculation Expression will be written to the Field to Update field for each donor.

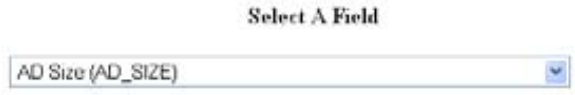
9. Enter a **Calculation Expression** in the field provided.

In its simplest form, the Calculation Expression can be a single field name, or it can be a mathematical expression like **FieldX + Field Y** or **FieldZ * 1.534**. You can either type in field names manually, or select the field using the lookup function.

a. To add a field name using the lookup function:

   i. Click on the lookup icon at the end of the Calculation Expression.

   A popup window appears containing a list of all the field in the **Table to Calculate** table:



   ii. Select the desired field from the **Select a Field** list. Once you select the field, the popup will close, and the selected field name will be added to the **Calculation Expression**.

10. Check **Set Selection Filter** to put an optional selection filter in place. This will prevent certain records from appearing in the calculations. See "Using Selection Filters" on page 159 for details.

> Note: When creating a selection filter to use with a calculated field, you should always give the selection filter a name using the Save As field. This ensures that the filter settings will still be in the system the next time the calculated field updates.

11. If **Run Calculation on Record Save** is checked, this field will be recalculated for the current constituent whenever a transactional record is saved (Gift, Contact, Other Info- old or new transaction). If this option is not checked, the field will not be recalculated unless you manually trigger a recalculation from the Calculated Fields screen (see "Recalculating Calculated Fields" page 356 for details).

12. If **Inactive** is checked, this calculated field will be deactivated, and will not be recalculated.

13. When you are finished editing the settings for the calculated field, click one of the following buttons:

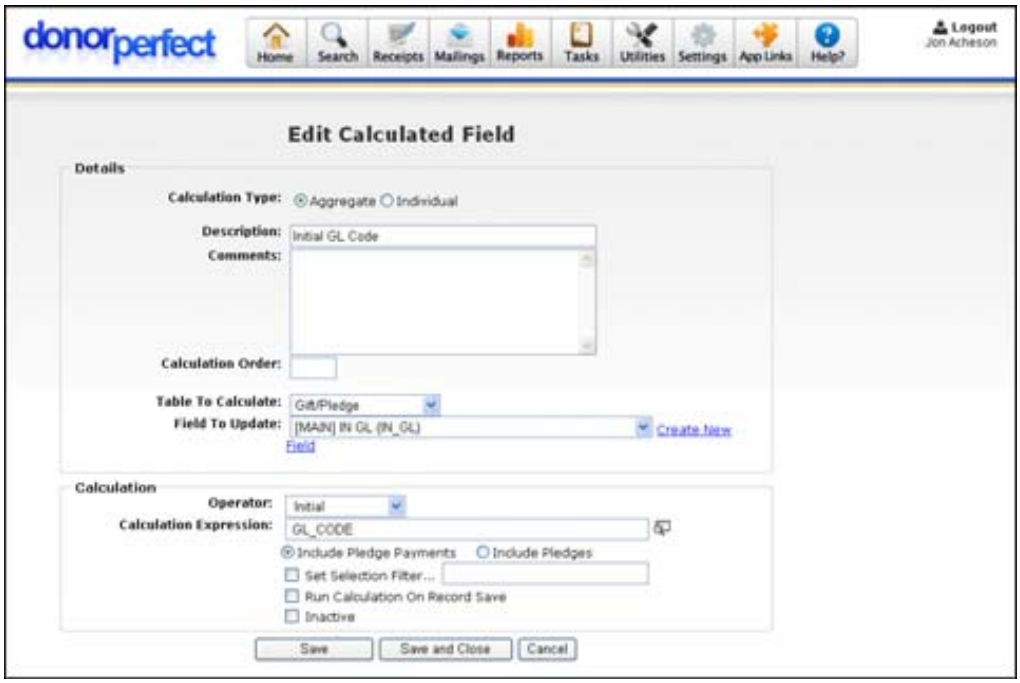
- Click the **Save** button to save your changes without leaving the Edit Calculated Field screen.
- Click the **Save and Close** button to save your changes and return to the Calculated Fields screen.
- Click the **Cancel** button to return to the Calculated Fields screen without saving changes.

Editing Calculated Fields

Once you have created a calculated field, you can go back to the Edit Calculated Field screen and change the settings.

▶ To edit a calculated field

1. From the navigation bar, select **Settings** and then select **Calculated Fields**.
2. Click the **Edit** link next to the calculated field you want to edit. The Edit Calculated Field screen reopens.



3. Edit the settings of the calculated field.
4. When you are finished editing the settings for the calculated field, click one of the following buttons:
   - Click the **Save** button to save your changes without leaving the Edit Calculated Field screen.
   - Click the **Save and Close** button to save your changes and return to the Calculated Fields screen.
   - Click the **Cancel** button to return to the Calculated Fields screen without saving changes.

Recalculating Calculated Fields

The rules for when calculated fields get recalculated are as follows:

1. If the calculated field is active, and **Run Calculation on Record Save** is checked, the field will be updated every time a transaction record is edited or added to the system. Only the field for the affected constituent will be updated.

If you click on the **Recalculate** button on the Calculated Fields screen, the field will be updated for all donors.

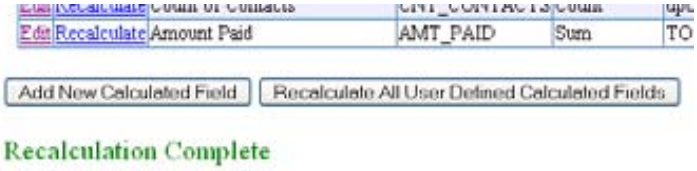
2. If the calculated field is active, but **Run Calculation on Record Save** is not checked, the field will only be updated if you click on the **Recalculate** button on the Calculated Fields screen. The field will be updated for all donors.
3. If the calculated field is set to **Inactive**, it will not be updated even if you click on the **Recalculate** button on the Calculated Fields screen.

The Calculated Fields screen allows you to recalculate individual fields, or recalculate all fields at once.

Recalculating Individual Calculated Fields

▶ To recalculate an individual calculated field

1. From the navigation bar, select **Settings** and then select **Calculated Fields**.
2. Click the **Recalculate** link next to the calculated field you want to recalculate.
3. Once the field is recalculated for all donors, a "Recalculation Complete" message will appear at the bottom of the screen.



Recalculating all Calculated Fields

▶ To recalculate all calculated fields at once

1. From the navigation bar, select **Settings** and then select **Calculated Fields**.
2. Click the **Recalculate All User Defined Calculated Fields** button.
3. Once the field is recalculated for all donors, a "Recalculation Complete" message will appear at the bottom of the screen.

Code Maintenance

Codes are an important element in DonorPerfect because they help ensure the consistency of your data throughout the system.

For details, see "Code Maintenance" on page 27.

Defaults

You can set default values that will be used when you enter data. For example, if the majority of your gift entries have a General Ledger code of **UN** and a solicitation code of **DM06**, you can set the defaults so the fields automatically default to these values when new gifts are being entered.

This option can be used even if a certain value will only be used for a short period. For instance, solicitation code **XMAS** may be used for just a couple of weeks after the Christmas mailing.

Each user sets defaults. For example, one user can set defaults for themselves, while other users can set up their own for other uses. To set the defaults for yourself, you must log in with your user name and password.

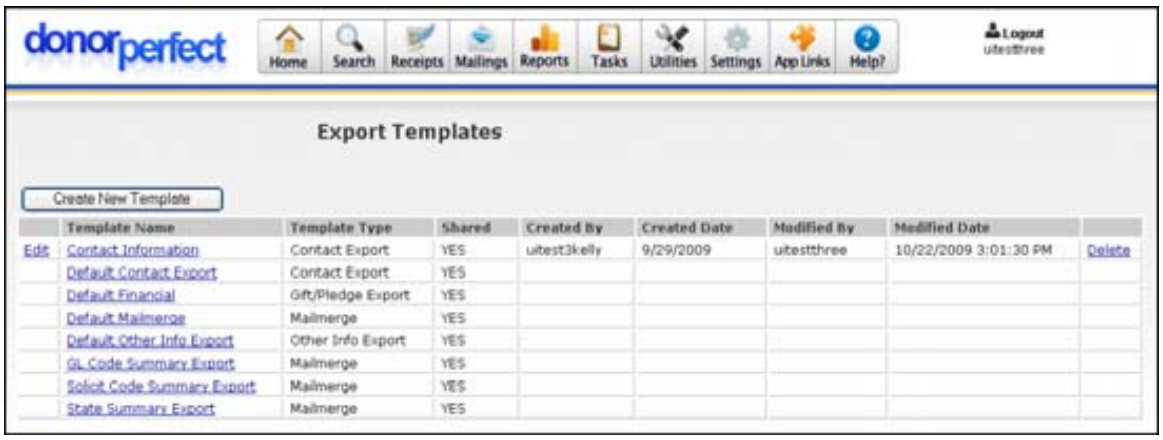
▶ To set defaults

1. From the navigation bar, select **Settings, Defaults.** The **User Screen Defaults** page appears.

2. Click on the entry screen you want to set up defaults for. This will pull up a replica of that entry screen.
3. Enter the default value(s) in the desired fields.
4. When you're done defining the defaults, click **Save.**

Export Templates

Export Templates allow you to define which fields should be included in export files that you create throughout the system.



You can create five different types of export templates:

- **Mailmerge:** includes donor information from the Main and Bio screens. You can access your saved Mailmerge export templates in **Mailings/Mailmerge** and **Reports/Acknowledgements /Receipts.** The system comes with a Default Mailmerge export template that includes all the donor fields in the system—this template cannot be edited or deleted.
- **Gift/Pledge Export:** includes donor and gift information. You can use these templates in any Financial Report drilldown that contains donor and gift information. The system comes with a **Default Financial** Gift/Pledge Export template that includes all the donor and gift fields in the system—this template cannot be edited or deleted.
- **Contact Export:** Includes all Contacts information.
- **Other Info Export:** Includes all Other Info information.
- **Gift/Pledge Summary:** Includes summary information about gift and pledge activity, which will be grouped according to a field you select.

Previewing an Export Template

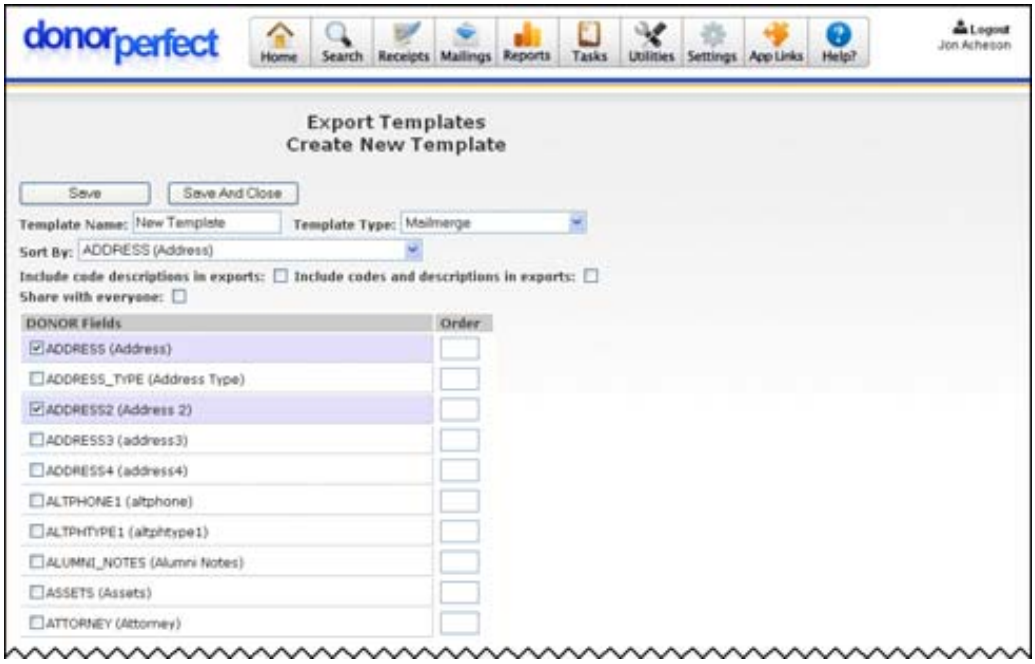
▶ To preview an export template

1. From the navigation bar, select **Settings** and then click **Export Templates.**
2. Click the hyperlinked template name. A list of the export template fields in their sorted order appear on-screen.

Creating an Export Template

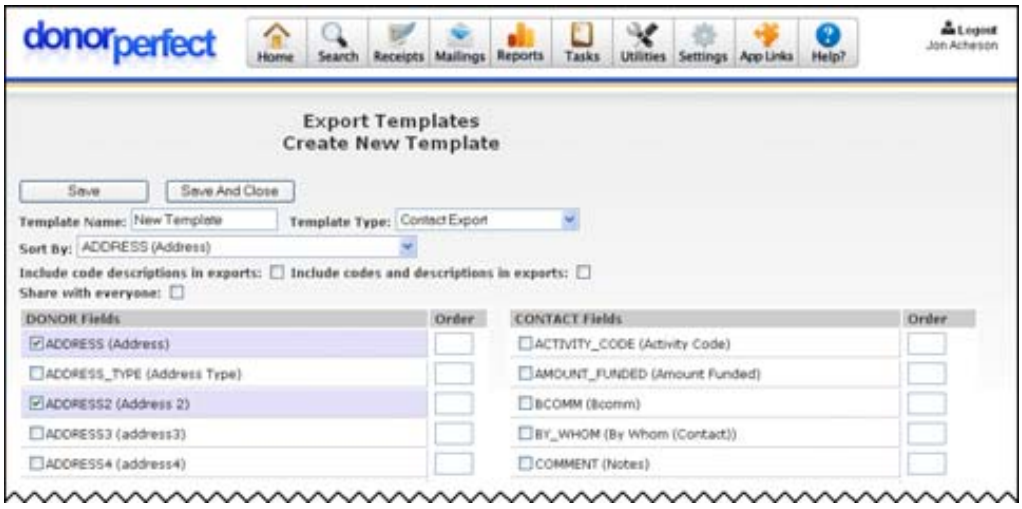
▶ To create an export template

1. From the navigation bar, select **Settings**, and click **Export Templates**.
2. Click the **Create New Template** button.

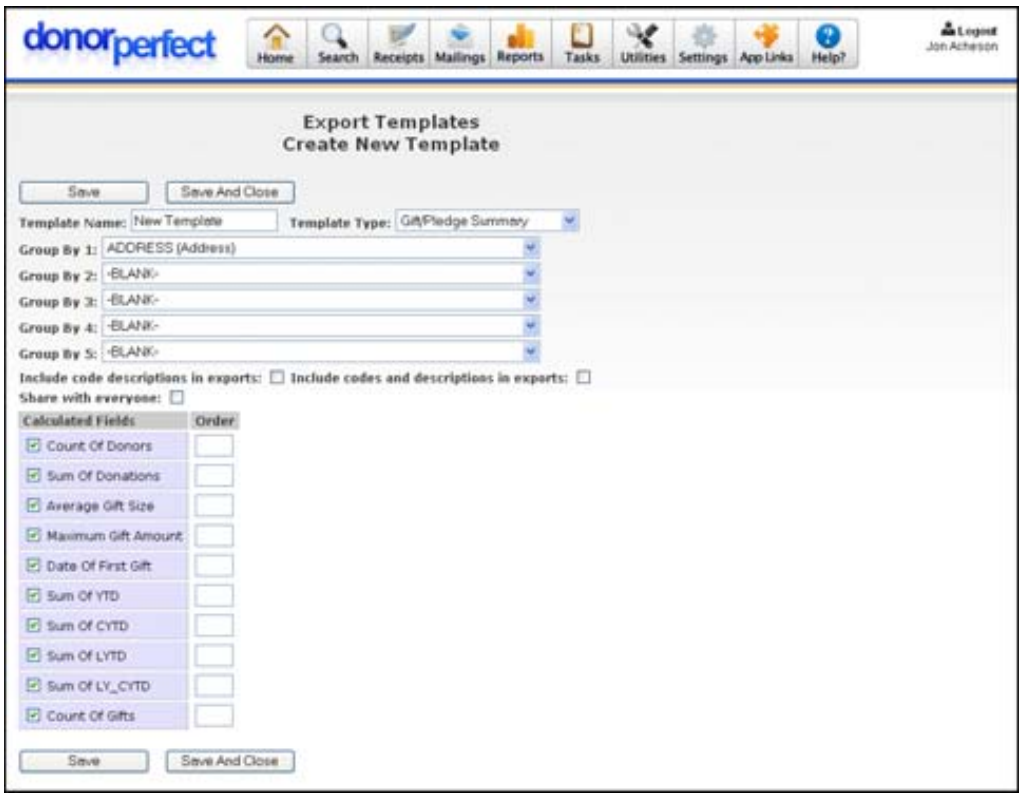


3. In the **Template Name** field, enter the name for the template.
4. From the **Template Type** pull-down, choose **Mailmerge**, **Gift/Pledge Export**, **Contact Export**, **Other Info Export** or **Gift/Pledge Summary**. The type of export you choose determines which fields show up on-screen for selection and where in the system you can access the template.

   If you selected **Gift/Pledge Export**, **Contact Export** or **Other Info Export**, a second column of fields will appear containing the fields from the relevant screen:



   If you selected **Gift/Pledge Summary**, you will see a set of summary calculation fields instead of the standard table fields:



5. If you selected the **Mailmerge**, **Gift/Pledge Export**, **Contact Export**, or **Other Info Export** template types, choose the field that you want to use to sort the records in the exported file from the **Sort By** list.
6. If you selected **Gift/Pledge Summary**, choose the field you want to use to group the summary records from the **Group By** list. For instance, you can generate summary records for each **Donor ID**, or each **City** or **State**.
7. If you want to include the description (e.g., Vacation Home) for coded fields instead of just the code (e.g., VACA), click the **Include code descriptions in exports** check box.
8. If you want to share this export template with other users, click the **Share with everyone** check box.
9. Click the check box to the left of each field you want to include in the export template.
10. If you want to define the order in which the fields will appear in the export file, enter a number in the **Order** column for each field. If you don't set the order, the fields will appear in the order they appear in the selection list.
11. When you're done defining the template, do one of the following:
    - Click the **Save** button to save changes but keep the Create New Template screen open. The fields that are selected to include in the export template will be listed together at the top of each section, making it easier to review them.

- Click the **Save and Close** button to save changes and return to the Export Templates screen.

Editing an Export Template

▶ To edit an export template

1. From the navigation bar, select **Settings**, and click **Export Templates**. A list of the available export templates appears.
2. Next to the template you want to edit, click the **Edit** link. A message appears, asking if you're sure you want to edit the link.
3. Click **OK**.
4. Make the necessary changes to the template, and then click the **Save Template** button.

Deleting an Export Template

▶ To delete an export template

1. From the navigation bar, select **Settings**, and click **Export Templates**. A list of the available export templates appears.
2. Next to the template you want to delete, click the **Delete** link. A message appears, asking if you're sure you want to delete the template.
3. Click **OK**. The template is removed from the system.

Filters

See "Using Selection Filters" page 159 for details on selection filters.

Order Management

The product order module allows you to keep track of product orders associated with a gift. This module includes the ability to change inventory levels, enter in the product orders as well as report on transactions, inventory levels, and multi year sales trends. This is available as an additional module; contact your sales representative.

This module allows you to go through the complete order process, which includes:

- Setting up your inventory.
- Entering in product orders and downloading.
- Reporting on the orders.
- Reporting on inventory and trends.

Manage Inventory

▶ To manage inventory

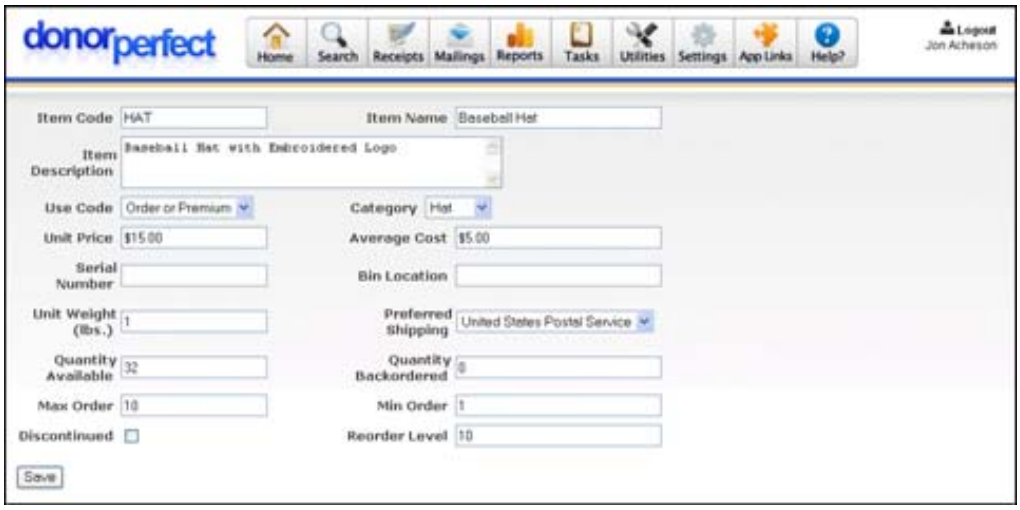
1. Click **Settings**, and then click **Order Management**. The **Order Management Screen** appears.

2. Click **Manage Items/Inventory**. The **Manage Items/Inventory Screen** appears.

Adding an Item

▶ To add an item

1. Click **Add Item**. The **Product Order Item Screen** appears.



2. Fill in any of the following information for the new item:

Item Code	This is the number assigned to the individual item. This code can be either numeric or alphabetic.
Item Description	This is a brief description of the item.
Use Code	This is what the item is used for. Each item can be used for orders, premiums, or both.
Unit Price	This is the price of one unit of the item.
Serial Number	This is the serial number of the item.
Unit Weight	This is the weight of one unit of the item.
Quantity Available	This is the quantity of units available for each item code.
Max Order	This is the maximum number of units that can be purchased for one order.
Item Name	This is the name of the item.
Category	This is the category in which the item is considered to be.
Average Cost	This is the average cost of the item.
Bin Location	If a system of bins is used for item storage, then this would be filled in with the location of the bin in which the item is located
Preferred Shipping	The preferred shipping method for the item.
Quantity Backordered	This is the quantity of units backordered for each item code.
Min Order	This is the minimum number of units that can be purchased for one order.
Reorder Level	When this quantity of units remaining in inventory is reached, more units must be ordered.

Editing Items

▶ To edit items

1. Click the **Edit** link next to the desired item. Any field can be updated depending on desired inventory levels or other desired changes. The **Product Order Item Screen** appears.

Deleting Items

▶ To delete items

1. Click the **Delete** link next to the desired item. A message appears asking if you want to delete the item.
2. Click **OK**.

Enabling Product Order Entry

In order to be able to enter product orders into the system, you must first enable the Order Entry feature.

▶ To enable product order entry

1. In the navigation bar, click the **Settings** button, then click **User Security**.

Next to your **User ID**, click the **Edit** button.

In the **Entry Screens** section, check the **Order Entry** option.

Click the **Save** button.

Log out, and log back into DonorPerfect Online.

Entering Product Orders

Product Orders are entered to keep track of items sold. Within these orders, several different items can be sold as well as several units of each item.

▶ To enter product orders

1. Find the donor for which you want to add a product order.
2. Click **Gifts**, and then click the **Add Order** button.
3. From the **Gift List screen** click **Add Order**. On the page that appears, find the **Order Information** section.

4. Enter the following information:

   - **Order Date:** The date the order is made.
   - **Total Items:** This field is filled in automatically after an order is entered.
   - **Order Terms:** The terms of the payment of an order.
   - **Pre-Pay Backorder:** If selected, an item on backorder can be reserved and paid for in advance.
   - **Order Type:** Orders Only is automatically filled in.
   - **Ship Status:** Usually, this field will be filled in automatically as Open. However, it can be manually changed once the order is shipped or if the item(s) is on backorder.
   - **Shipped Date:** This will be filled in with the date the order is shipped.
   - **Backorder Date:** This will be filled in with the date the backorder will be in stock.

5. To add items to an order, enter the appropriate number in the **Rows to Add** field, and then click the **Add Product Detail** button.

6. Enter the **Item Code**, or click the binoculars to look up an item in the database. When the binoculars are clicked, the **Lookup Item Screen** appears. Click the item you want to select.

7. Then, fill in the appropriate **Solicitation**, **Media**, **Price Code**, and **Quantity**.

> Note: To delete an item transaction, clear out the item code, and click Save Detail.

8. Click **Save Detail** to save your items.
9. After entering the order, click **Save** to return to the **Gifts** screen.

If an item is out of stock, a message will say that the item is currently not available and will be placed on backorder.

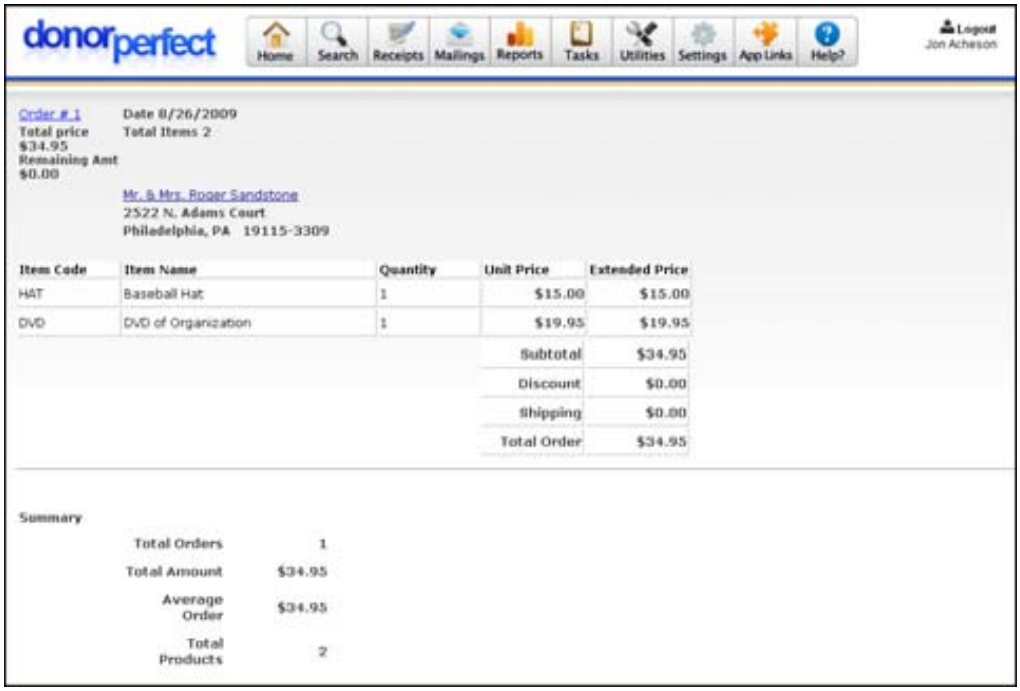
Product Order Reports

A product order report can be used to determine which orders are still open and need to be shipped. Also, it can determine whether the ship status is closed or backordered.

▶ To run product order reports

1. Click **Settings**, and then click **Order Management**. The **Order Management Screen** appears.
2. Click **Report/Download Orders**. The **Product Order Report Screen** appears.

3. Fill in your desired criteria (for example, Ship Status = Open).
4. Click **View Report**.



5. You can also choose **Download File**. This file would include all the information you would see in the report, but you would be able to utilize it for such things as mailing labels and custom invoices.

Updating and Filling Orders

▶ To update and fill orders

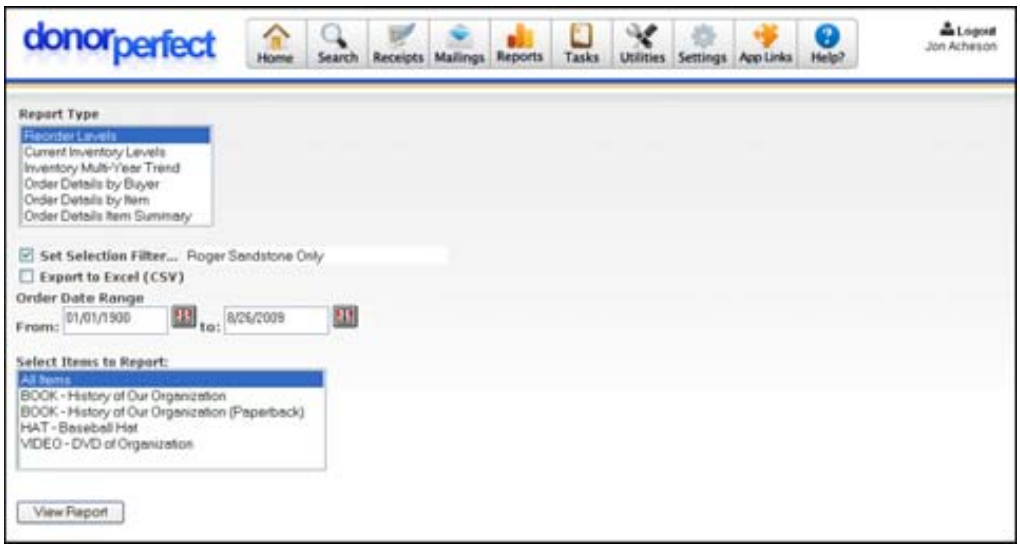
1. On the **Product Order Report Screen** select **Open** under **Ship Status,** and then click **View Report** to see a report of what orders are currently still open.
2. In order to fill and update an order, select **Open** under **Ship Status** on the **Product Order Report Screen,** then select **Update Ship Status to Closed?** and enter a date in the **Update Ship Date to** date box. Finally, click **View Report** to see a report of what orders have just been closed.

Inventory Reporting

Inventory reports can be used to check reorder levels, current inventory levels, inventory multi-year trend, and monthly sales.

▶ To view inventory reports

1. Click **Settings**, and then click **Order Management**. The **Order Management Screen** appears.
2. Click **Inventory Reporting**. The **Inventory Reporting Screen** appears.



You can run any of the reports by selecting the report and clicking **View Report**.

Reorder Levels

The **Reorder Levels Report** is a listing of all the items that have a current inventory quantity that is below the reorder quantity.

▶ To view the Reorder Levels report

1. From the **Inventory Reporting Screen**, select **Reorder Levels** under **Report Type.**
2. Enter the date range.
3. Under **Select Items to Report**, choose which items you want to view in the report.
4. Click **View Report**.

Current Inventory Levels

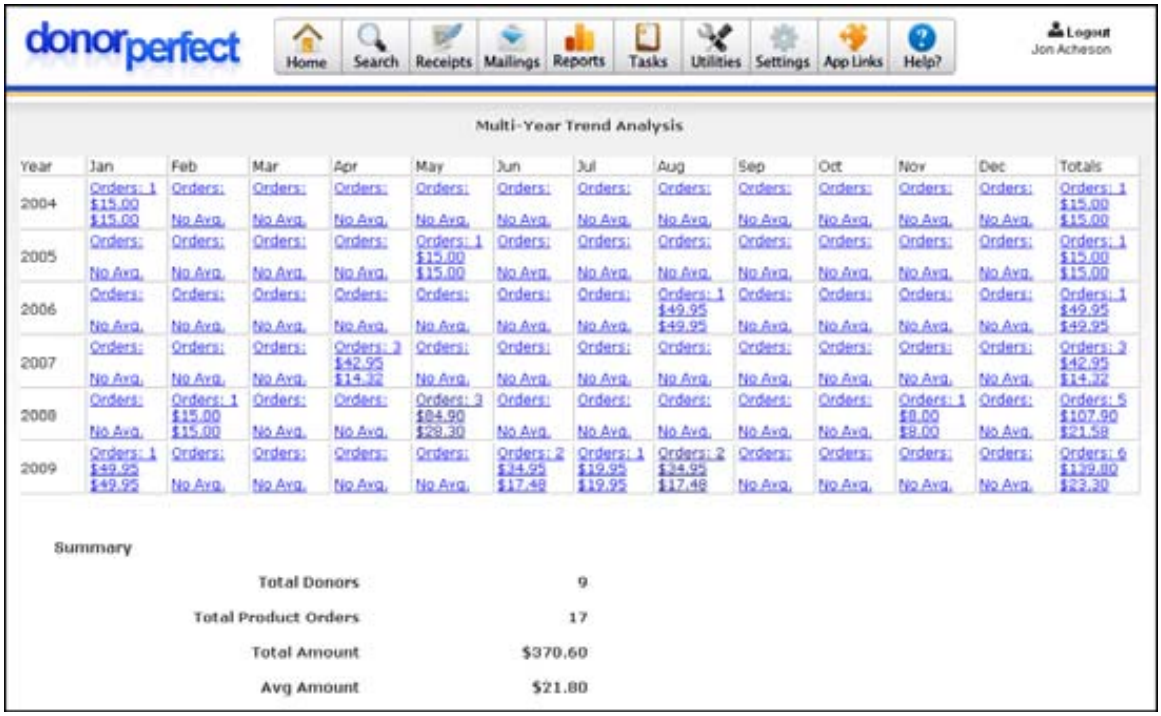
The **Current Inventory Levels Report** is a listing of all the items that are currently in stock.

▶ To view the Current Inventory Level report

1. From the **Inventory Reporting Screen**, select **Current Inventory Levels** under **Report Type**.
2. Enter the date range.
3. Under **Select Items to Report**, choose which items you want to view in the report.
4. Click **View Report**.

Inventory Multi-Year Trend Analysis

The **Inventory Multi-Year Trend Analysis Report** is a listing of the total orders placed per month, per year, and a summary total of all orders placed within the past 5 years. For each of these three time periods, the total number of orders placed, the total dollar amount for all orders, and the average dollar amount per order is shown.



▶ To view the Multi-Year Trend Analysis report

1. From the **Inventory Reporting Screen**; select **Inventory Multi-Year Trend** under **Report Type**.
2. Enter the date range.
3. Under **Select Items to Report**, choose which items you want to view in the report.
4. Click **View Report**.

Order Details by Buyer

The **Order Details by Buyer Report** shows transactions grouped by the person who made it. For each transaction, the quantity and unit price is displayed. A sum of the quantity and total dollar amount of all orders for each person is shown. The total number of items and the total dollar amount of all orders placed for all people in the report is displayed at the bottom of the report.

Buyer	Date	Item Code	Item Name	Quantity	Unit Price	Extended Price
Mr. & Mrs. John R. Beattie	1/26/2009	BOOK1	History of Our Organization	1	$49.95	$49.95
Donor Totals:			Total Quantity	1	Total Amount	$49.95
Mr. & Mrs. Roger Sandstone	8/26/2009	HAT	Baseball Hat	1	$15.00	$15.00
	8/26/2009	DVD	DVD of Organization	1	$19.95	$19.95
Donor Totals:			Total Quantity	2	Total Amount	$34.95
Mr. Tom Warner	6/10/2009	HAT	Baseball Hat	1	$15.00	$15.00
	6/10/2009	DVD	DVD of Organization	1	$19.95	$19.95
Donor Totals:			Total Quantity	2	Total Amount	$34.95
Mr. Craig Woodley	7/6/2009	DVD	DVD of Organization	1	$19.95	$19.95
Donor Totals:			Total Quantity	1	Total Amount	$19.95

Summary

Total Amount	$139.80
Total Items	6

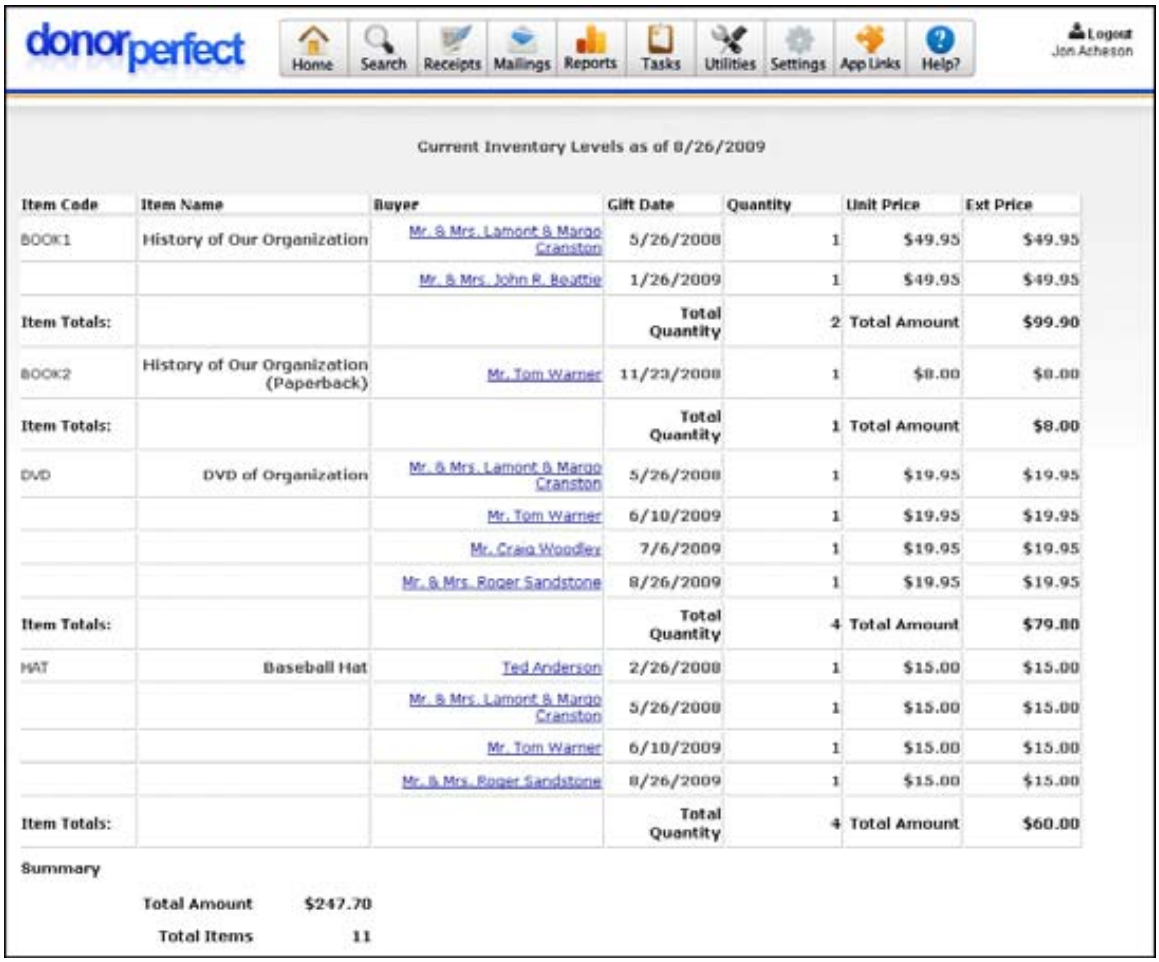
▶ To view the Order Details by Buyer report

1. From the **Inventory Reporting Screen**, select **Order Details by Buyer** under **Report Type**.
2. Enter the date range.
3. Click **View Report**.

Order Details by Item

The **Order Details by Item Report** groups transactions by the individual item. For each transaction, the date, quantity, unit price, and extended price are displayed. A sum of the total quantity and total dollar amount of all orders for each item is shown. The total number

of items and the total dollar amount of all orders placed for all items is displayed at the bottom of the report.



donorperfect — Home | Search | Receipts | Mailings | Reports | Tasks | Utilities | Settings | App Links | Help? — Logout Jon Acheson

Current Inventory Levels as of 8/26/2009

Item Code	Item Name	Buyer	Gift Date	Quantity	Unit Price	Ext Price
BOOK1	History of Our Organization	Mr. & Mrs. Lamont & Margo Cranston	5/26/2008	1	$49.95	$49.95
		Mr. & Mrs. John R. Beattie	1/26/2009	1	$49.95	$49.95
Item Totals:			**Total Quantity**	2	**Total Amount**	**$99.90**
BOOK2	History of Our Organization (Paperback)	Mr. Tom Warner	11/23/2008	1	$8.00	$8.00
Item Totals:			**Total Quantity**	1	**Total Amount**	**$8.00**
DVD	DVD of Organization	Mr. & Mrs. Lamont & Margo Cranston	5/26/2008	1	$19.95	$19.95
		Mr. Tom Warner	6/10/2009	1	$19.95	$19.95
		Mr. Craig Woodley	7/6/2009	1	$19.95	$19.95
		Mr. & Mrs. Roger Sandstone	8/26/2009	1	$19.95	$19.95
Item Totals:			**Total Quantity**	4	**Total Amount**	**$79.80**
HAT	Baseball Hat	Ted Anderson	2/26/2008	1	$15.00	$15.00
		Mr. & Mrs. Lamont & Margo Cranston	5/26/2008	1	$15.00	$15.00
		Mr. Tom Warner	6/10/2009	1	$15.00	$15.00
		Mr. & Mrs. Roger Sandstone	8/26/2009	1	$15.00	$15.00
Item Totals:			**Total Quantity**	4	**Total Amount**	**$60.00**

Summary

Total Amount	**$247.70**
Total Items	**11**

▶ To view the Order Detail by Item report

1. From the **Inventory Reporting Screen**, select **Order Details by Item** under **Report Type**.
2. Enter the date range.
3. Click **View Report**.

Order Details Item Summary

The **Order Details Item Summary Report** shows current inventory levels for all items. The quantity, unit price, and total price are shown for each item. The total quantity and total dollar amount for all items shown in the report appear at the bottom of the report.

▶ To view the Order Detail Summary report

1. From the **Inventory Reporting Screen**, select **Order Details Item Summary** under **Report Type**.
2. Enter the date range.
3. Click **View Report**.

Parameters

You have the ability to set parameters in DonorPerfect that will define how your system works in several different areas:

▶ To access parameters

1. From the navigation bar, select **Settings**, and then click **Parameters**. The **Parameters** screen appears.

2. Click the link for which you want to define parameters.

Entry Screens

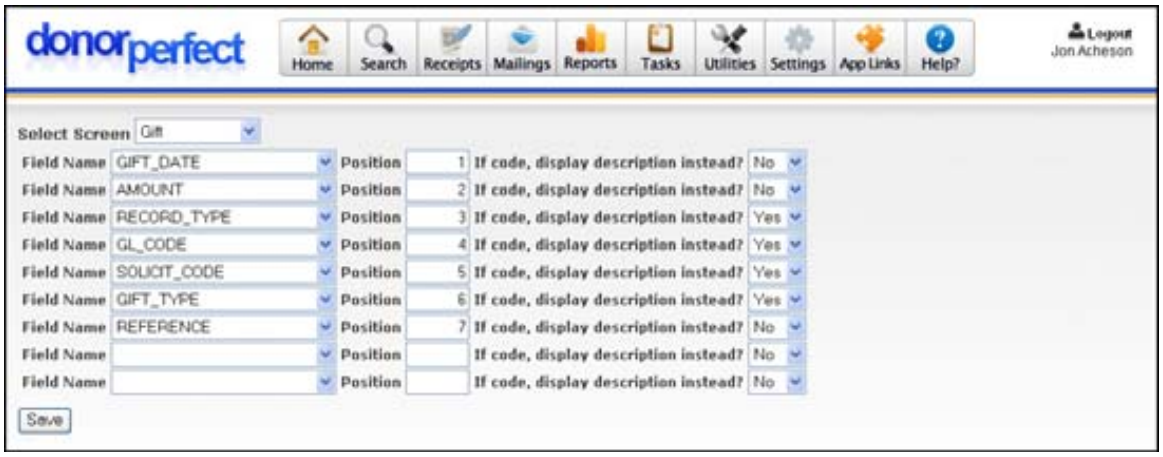
You can define the following parameters for entry screens:

Parameter	Definition
Auto-calc Membership Category	Check the box for automatic calculations for MCAT. If checked, the MCAT field (membership category) will be automatically updated based on the gift's size. The membership category size ranges are set when entering the MCAT field description in *Utilities*, *Code Maintenance*; see *114.* For this option to work, the General Ledger code must be set as one that updates MCAT. Add the field MCAT_updown to see the prior membership per donor.
Auto-calc Membership Expire Date	Check to automatically calculate the expiration date for memberships when a membership gift is received. If checked, the MCAT_expire_date field (expiration date) will automatically be updated according to the following rules: If the membership is new, the expiration date will be set to the gift date plus the MCAT Length in months that was set for the Membership Type code. If the membership is not new, the expiration date will be set to one of the following: o If the renewal gift date occurs less than 180 days after the previous expiration date, the new expiration date will be set to the previous expiration date plus the MCAT Length for the Membership Type. o If the renewal gift date is more than 180 days after the previous expiration date, the new expiration date will be set to the renewal gift date plus the MCAT Length for the Membership Type. If the MCAT_enroll_date (enrollment date) field exists in the system, and is blank, it will be filled with the gift date. For this option to work, the Membership General Ledger code must have the Update Membership option checked, and MCAT selected.
Show DO NOT CALCULATE field	Allows the DO NOT CALCULATE option to show up.
Show RECEIPT field	Allows the RECEIPT field to show up.
Show Linked Gifts in Gift Pledge Grids	If you want the name of a person linked to a certain gift to appear on the pledge and gift grid screen.
Track address change history?	If this box is checked, when a change is made to the address on the Main Screen of a record, the previous address is placed in the Addresses Screen. The address type in the Addresses Screen is set to Old Address automatically.
Check for duplicates when creating new donors?	If this box is checked, the system will check for duplicate records automatically as you enter new donors. If any are found, the Duplicate Check Screen will appear. From there you may either update the selected donor, go to the selected donor to make changes, create a new donor, or go back to the data entry screen.

Parameter	Definition	
Solicitation Code Display	Determines what the appearance of the Solicitation field will be. Choose one of the following:	
	Dropdown List	The Solicitation field will consist of a drop-down list of the available solicitation codes. Users can only select a code from the list, they cannot enter new values.
	Freeform Textbox	The Solicitation field will consist of a text box in which users can enter any text string.
Validate Solicitation Code?	If checked, the system will check to see that the code entered into the Solicitation field is valid. This is useful when Solicitation Code Display is set to Freeform Textbox.	
Use Codes for Country Field	If checked, the Country field in the Main Entry screen will become a selection list, instead of a text box, so that users can select the country from a list of valid country codes. Selecting a country other than United States will change the address fields in the Main Entry screen into an international format suitable for that country.	
Phone Number Mask	Enter a mask statement that will define the format in which phone numbers must be entered. For instance entering the following mask: **(###) ###-####** would force phone numbers to be entered like (215) 5555-1212.	
Check for open pledges during gift entry	If checked, during gift entry, the system will display a message alerting you to open pledges, if any, from the donor and giving you the opportunity to apply the new gift to a pledge.	
Carry over values from the main gift to the linked gift(s)?	This setting determines whether changes to a gift record are carried over to its "child" linked gift records. The available settings are Always (parent overwrites child automatically), Never (Parent never overwrites child), or Prompt (the system will ask what to do). The default setting is Never.	
Soft Credit, Notification and Matching Gift	Enter the General Ledger, Solicitation, Gift Type, and Thank-you Letter # codes that will automatically be entered into these special types of gift entries when they are created.	
Household Giving Report	The following parameters are located underneath the phone number mask, beneath a horizontal line separating them from the other parameters. They are used to set the report options for the Household Giving Report.	
	Relationship	Select the type of relationship to be featured in the report, such as Parent-Child.
	Date Range	The starting and ending dates of the date range for the gifts that will appear in the report.
	Set Selection Filter	Check to put an optional selection filter in place. This will prevent certain records from appearing in the report. See "Using Selection Filters" on page 159 for details.

Entry Screen Grid Fields Parameters

The **Entry Screen Grid Fields Screen** allows you to change the field headings whenever DonorPerfect Online displays a list of transactions. For example, when pulling up a name, you can specify that Last Name, First Name, Address, and Grad Year be displayed. Likewise, when pulling up the donor's list of gifts, you can specify that only Amount, Solicitation Code, and Table Number appear.

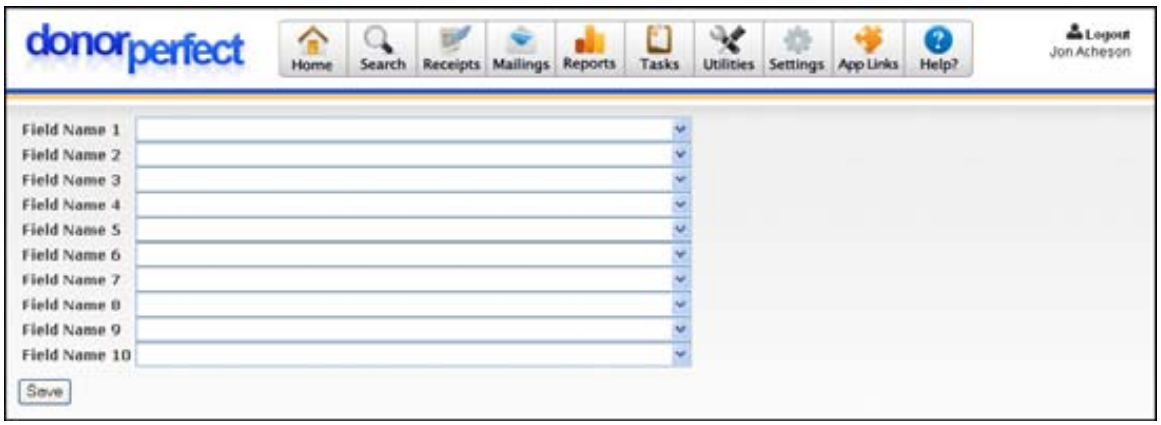


In order to define the fields, you need to choose a screen from the **Select Screen** pull-down. Then, you can make the following selections for each screen:

Parameter	Definition
Field Name	Displays the name of the field that is going to be shown.
Position	Tells where the field will be displayed. For example, 1 indicates that the field will be located on the far left; while 6 indicates that the field will be located on the far right.
If code, display description instead	Allows for the choice of having the actual code displayed or having the full description displayed. For example, if the field name was Solicit_code, and this option was selected, the whole phrase Spring Mailing 2006 would be displayed, as opposed to the code SP06.

Donor Search Field Parameters

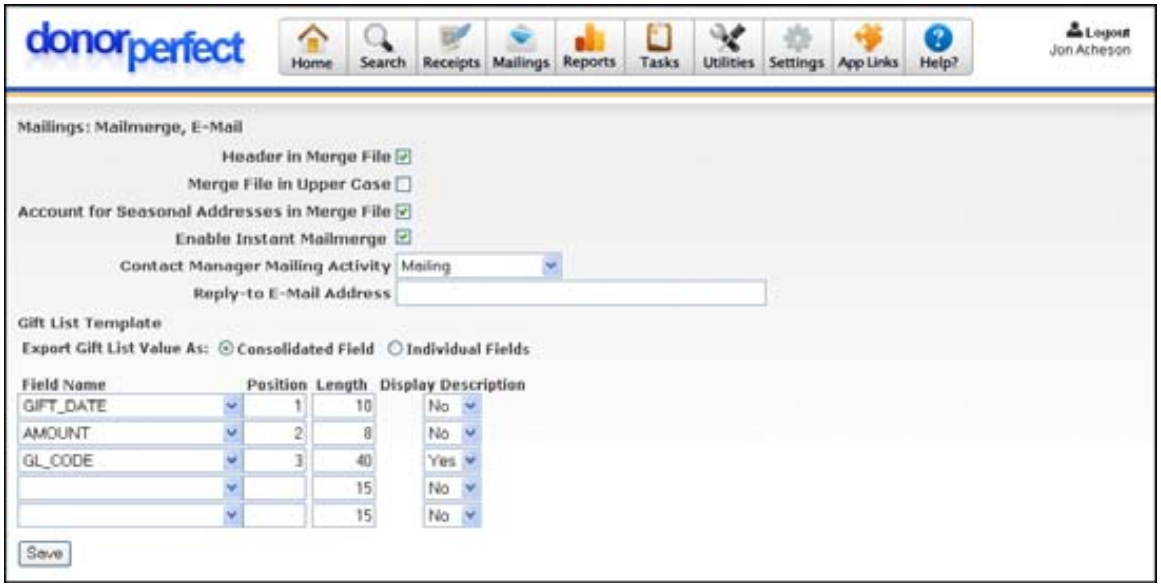
The Donor Search Field Parameters screen allows you to select additional search fields that will appear on the Search screen, in addition to the standard fields.



To add a field to the Search screen, select it from one of the **Field Name** lists.

Mailings Parameters

The **Mailings Parameters Screen** allows you to set up preferences for mail merge data files and label formats.



You can define any of the following mailing parameters:

Parameter	Definition
Header in Merge File?	If checked, the top record of the mailmerge data file consists of the field names. This is required for MS Word comma delimited files.
Merge File in Upper Case	If checked, this will make the entire merge file in uppercase.
Account for Seasonal Addresses in Merge File	If checked, Date to Check Seasonal Addresses Against will appear on the Mailmerge Screen.. This feature makes use of the seasonal dates on the Addresses Screen.
Contact Manager Mailing Activity	Select type of mailing for the contact manager.

Reply-to Email Address	Enter the Reply to email address. This email address will appear on all outgoing group emails.

Click **Save** to keep any changes made.

Gift List Template

The **GIFT_LIST** field is provided as a way to include transaction data in a mail merge file. When a mail merge is run, and the **Include Gift List in Mailmerge** option is checked, the **GIFT_LIST** field will be populated with entries for all of a donor's gifts.

```
11/30/2007      $5,000.00       Scholarship      5000
11/30/2007      $800.00         Unrestricted     0
11/30/2007      $200.00         Education        0
11/30/2007      $200.00         Unrestricted     0
11/30/2007      $100.00         Building Fund    0
11/30/2007      $100.00         Disaster Relief  0
12/3/2007       $1,000.00       Scholarship      0
```

The selection filter that is in use will determine which gifts appear in the Gift List field. For instance, if the selection filter specifies a date range for Gift Dates, only gifts that fit within that range will appear in the Gift List field. If no selection filter is used, all of the donors' gifts that are in the system will appear in the Gift List field.

The Gift List can be output in one of two ways:

- **Consolidated Field:** the gift list is output as a single field that contains all of the gift entries formatted using fixed columns, with spaces inserted to pad each column out to a specified minimum length. You must format the gift list and its headings with a monospaced font such as Courier New or Lucida Console if you select this option.
- **Individual Fields:** the gift list is output as five separate fields, each of which contains all the entries for one of the columns in the gift list table. This provides more flexibility in formatting the gift list table, and allows you to use a broader variety of fonts.

To set up the Gift List, select Consolidated or Individual fields, then select up to five fields that can appear in the list, and click the **Save** button to save your changes.

Note: If you change the fields that are selected to appear in the Gift List, you will need to change the column headings in your merge document to match the new fields.

Selecting Consolidated or Individual Fields

To specify which method of output is used, set **Export Gift List Value as** to either **Consolidated Field** or **Individual Fields**.

Specifying the Gift List Fields

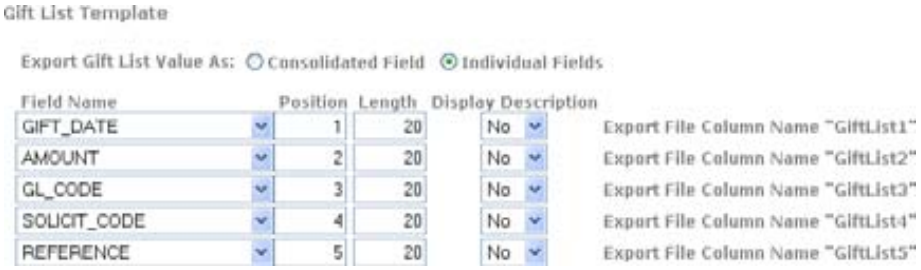
To specify the gift list fields, fill in the following information for each field:

Field	Definition
Field Name	Select the field that you want to appear in the Gift List.

Field	Definition
Position	Indicates the order of the fields. 1 is the leftmost field.
Length	The minimum length of the field. If the data takes up fewer characters than this, spaces will be inserted to pad out the field to this length. If the data is longer than this many characters, it will NOT be truncated, but instead will continue to its full length, at which point the next field will start. This can lead to columns being interrupted, so beware.
Display Description	This setting determines if coded fields will be listed using the descriptions for the codes, or the actual codes contained in the fields. Select No to display the code, or Yes to display the description that corresponds to this code instead.

For instance, to display the date, amount, General Ledger code, and Check #/Reference using a Consolidated Field, you would set up the fields like this:

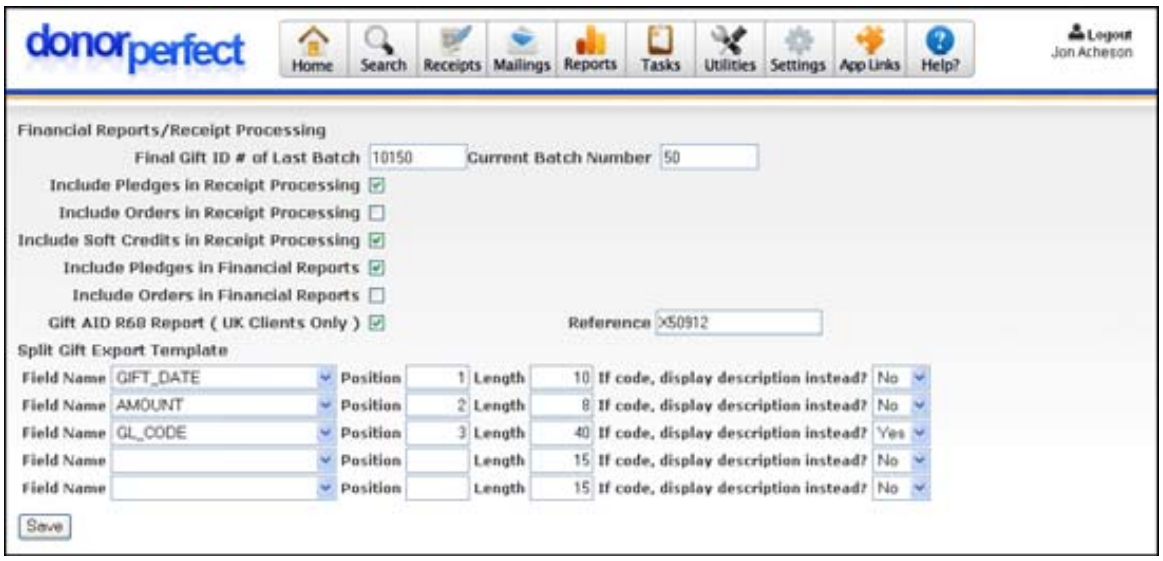
If **Individual Fields** are selected, the name of each of the individual gift fields is listed to the right of the other settings:



Note: When using the Consolidated Field option, it is best to put the information that tends to vary in length in the rightmost position, so that its fluctuation will not interfere with the alignment of the other columns.

Acknowledgements/Receipts, Financial Reports

The **Acknowledgements/Receipts, Financial Reports** screen allows you to define batch list and acknowledgement mail merge file parameters as well as set up the **SPLIT_GIFT** field.



You can define any of the following parameters for batches and financial information:

Parameter	Definition
Final Gift # of Last Batch	The last gift_id number that was assigned to the last gift in the last batch. It is automatically updated through acknowledgement processing.
Current Batch Number	This is the batch number to be assigned to the next batch
Include Pledges in Batch List	If checked, pledges will be included along with the gifts in the batch listings.
Include Linked Gifts in Batch List	If checked, linked gifts will be included along with the gifts in the batch listings.
Include Orders in Batch List	If checked, orders will be included along with the gifts in the batch listings.
Include Pledges in Financial Reports	If checked, pledges will be included along with gifts in financial reports. Note: This setting appears in both the Pledge Parameters screen and the Acknowledgement, Receipt, and Financial Report Parameters screen. The setting can be changed from either screen, and if it is changed in one screen, it will automatically change in the other.
Include Orders in Financial Reports	If checked, orders will be included along with gifts in financial reports.

Click **Save** to keep the changes made.

Split Gift Export Template

The **SPLIT_GIFTS** field is provided as a way to include multiple lines of split gift data in a single acknowledgement/receipts record. When the Acknowledgement/Receipts report is run the **SPLIT_GIFTS** field will be populated with entries for all of a donor's split gifts.

```
2/15/2007   $500.00   Disaster Relief
2/15/2007   $500.00   Building Fund
```

The **SPLIT_GIFTS** field is formatted as a set of fixed columns, with spaces inserted to pad each column out to a specified minimum length. If the data in a column is longer than the specified length, it will not be truncated, however.

To set up the **SPLIT_GIFTS** field, simply select up to five fields that can appear in the list, by filling in the following information:

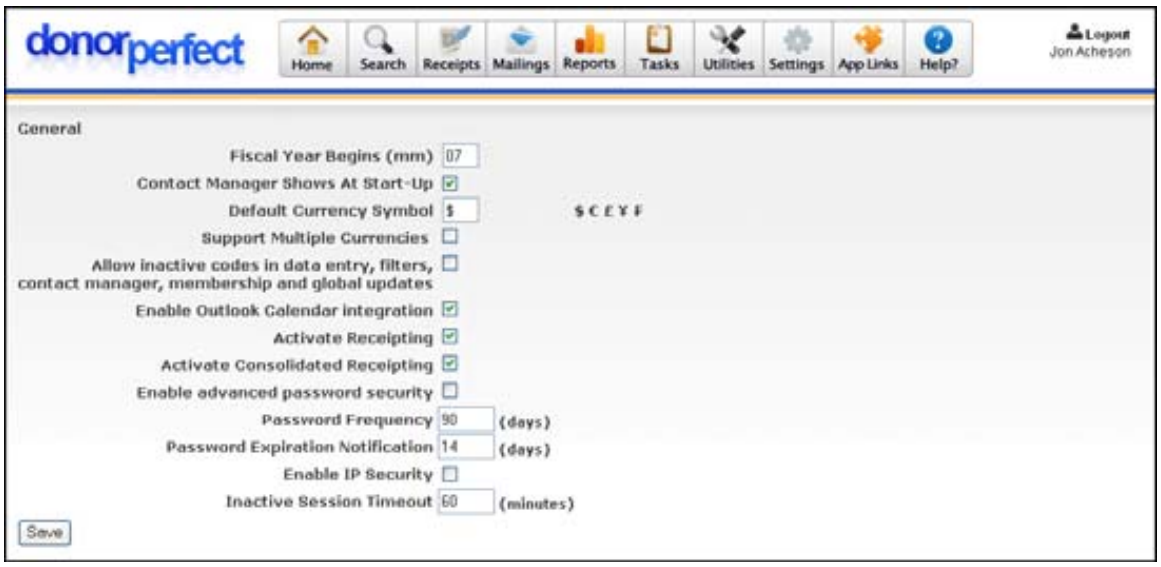
Field	Definition
Field Name	Select the field that you want to appear in the Gift List.
Position	Indicates the order of the fields. 1 is the leftmost field.
Length	The minimum length of the field. If the data takes up fewer characters than this, spaces will be inserted to pad out the field to this length. If the data is longer than this many characters, it will NOT be truncated, but instead will continue to its full length, at which point the next field will start. This can lead to columns being interrupted, so beware.
If code, display description instead?	Select No to display the code, or Yes to display the description that corresponds to this code instead.

For instance, to display the date, amount, and General Ledger code you would set up the fields like this:

Note: It is best to put information that tends to vary in length in the rightmost position, so that its fluctuation will not mess up the alignment of the other columns.

General Parameters

The **General Parameters Screen** allows you to define options, such as when the fiscal year starts and where to back up files, which affect the system's general operation.



You can define any of the following general parameters:

Parameter	Definition
Fiscal Year Begins (mm)	Defines the time period used to determine YTD totals on all reports and calculated fields. For example, if your fiscal year begins July 1, enter 07.
Contact Manager Shows at Start-up	If you're using contact management, you can have the system remind you of contacts due each day as you enter DonorPerfect Online. This option is set per user.
Currency Symbol	Select your organization's primary currency symbol from the list to the right of the text box.
Support Multiple Currencies	If checked, Multi-Currency Tracking will be enabled, allowing you to enter donations in various international currencies and automatically convert the donation values to the equivalent values in the system's base currency. For details, see "Using Multi-Currency Tracking" on page 434.
Allow inactive codes...	If checked, all inactive codes will be shown during data entry, while creating filters, in the contact manager and with global updates.
Enable Outlook Calendar Integration	If checked, this allows you to integrate your DPO Contact Entries with your Microsoft Outlook Calendar. Please note that you must have a version of Outlook with the Calendar function installed on your computer. See page 70 for more details.
Activate Receipting	If checked, you will be able to generate individual donation receipts.
Activate Consolidated Receipting	This parameter can only be enabled if Activate Receipting is enabled. If checked, you will be able to generate consolidated/annual receipts for Canadian donors.
Enable advanced password security	If checked, you can then define the Password Frequency and the Password Expiration Notification. In addition, checking this box will lock a user out of the system after three unsuccessful login attempts.
Password Frequency	Enter the number of days after which a password will expire.

Parameter	Definition
Password Expiration Notification	Enter the number of days in advance of the password expiration you want the system to show users a reminder to change their password.
Enable IP Security	Check to enable restricted login by IP address. See "Restricted Login Security" page 418 for details.
Inactive Session Timeout	The maximum length of time that the system may remain inactive before automatically ending a user session. The user will have to log back in after this.

Click **Save** to keep the changes made.

Pledge Parameters

The **Pledge Parameters Screen** allows you to define how pledges are handled in your system.

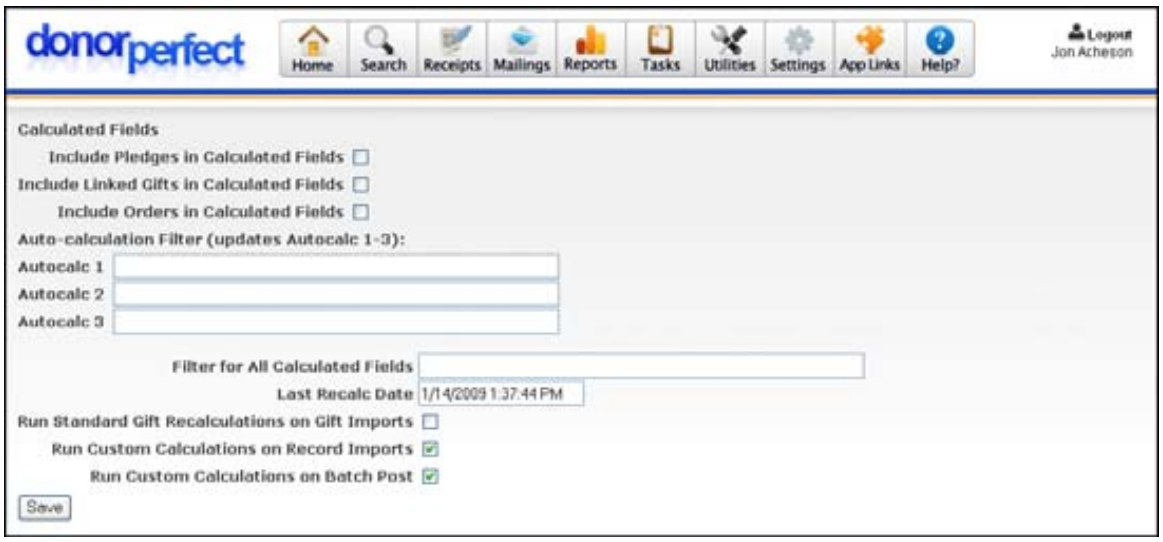
You can define any of the following pledge parameters:

Parameter	Definition
Include Pledges in Financial Reports	If checked, financial reports will include non-pledge payments plus pledge totals. Pledge dates are based on the pledge made date. **Note:** This setting appears in both the Pledge Parameters screen and the Acknowledgement, Receipt, and Financial Report Parameters screen. The setting can be changed from either screen, and if it is changed in one screen, it will automatically change in the other.
Allow Negative Pledge Balances	If checked, the system will show a negative pledge balance if the donor overpays. If unchecked, pledge balances will never be less than zero.
Last Reminder Sent	The date when the most recent pledge reminder was mailed.

Click **Save** to retain the changes made.

Calculated Field Parameters

Calculated fields are fields in your system that calculate a specific value based on the settings you define here. Some of the parameters you can set are which information to include in calculated fields and which filters to use for auto-calculated fields.



You can define any of the following parameters for calculated fields:

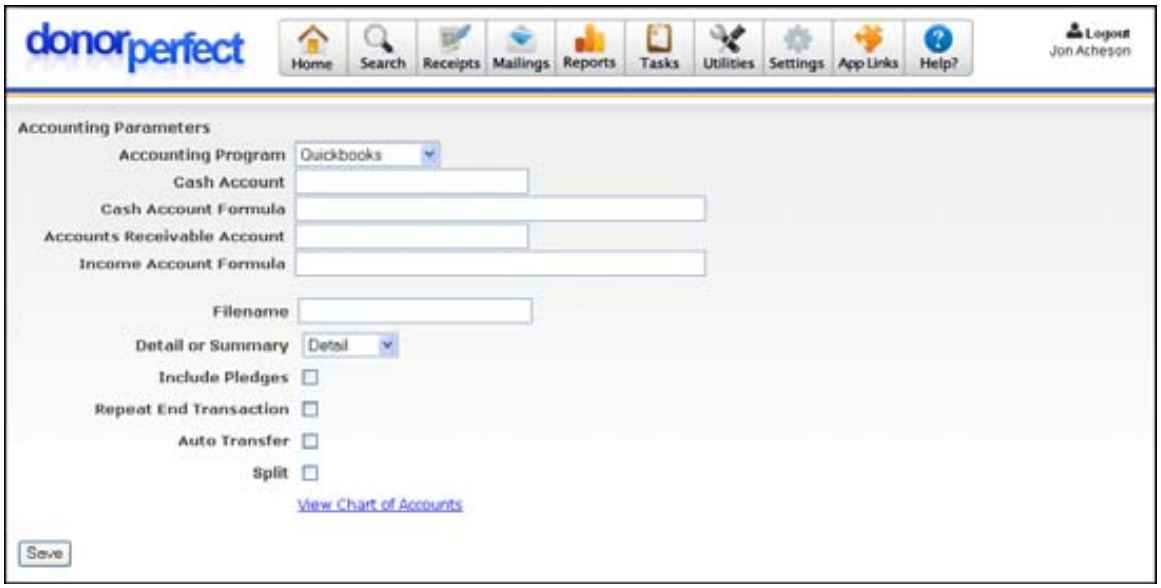
Parameter	Definition
Include Pledges in Calculated Fields	If checked, this will include pledge information in calculated fields.
Include Linked Gifts in Calculated Fields	If checked, this will include linked gifts in calculated fields.
Include Orders in Calculated Fields	If checked, this will include orders in calculated fields.
Auto-calculation Filter (updates AUTOCALC 1-3)	You have three optional auto-calculated fields (AUTOCALC1, AUTOCALC2, and AUTOCALC3). For example, if AUTOCALC1 is to be the total of all gifts with a General Ledger code of CC, enter the filter dpgift.gl_code = 'CC'. You will use auto-calculated fields, for instance, when you need a total of all giving for a specific gl_code over a two year period.
Filter for All Calculated Fields	If blank, calculated fields in the dp table (ytd, gtot, gifts, etc.) are based on just the gift records. Pledges and soft credits are ignored. Enter a filter to override the default. Below are examples of other filters for the calculations: dpgift.gl_code <> 'PROD' (don't include gift records with a gl_code of "PROD") dpgift.record_type IN ('G','S') (include both gift and soft credits in the calculations)
Run Standard Gift Recalculations on Gift Imports	If this box is checked, the standard calculated fields that are built into the system (YTD, MAX_AMT, LY_CYTD, etc.) will be recalculated each time one or more gift records is imported into the system.
Run Custom Calculations on Record Imports	If this box is checked, the custom calculations in the system will be recalculated each time one or more record import operations is carried out.

Parameter	Definition
Run Custom Calculations on Batch Post	If this box is checked, the custom calculations in the system will be recalculated each time a batch is posted via Batch Entry 1.0 or Batch Entry 2.0.

Click **Save** to retain the changes made.

Accounting Interface Parameters

The Accounting Interface Parameters screen allows you to set up parameters that allow DPO to interface with your accounting software.



You can set any of the following accounting parameters:

Parameter	Definition
Accounting Program	Select the accounting program you are using.
Cash Account	The account number for your cash account.
Cash Account Formula	If you have multiple cash accounts, and there is not a one-to correspondence between your GL Codes and the cash accounts, you will need to list a formula in this field that generates the correct cash account code. See “Creating Formulas for Accounting Module Fields” page 390 for details.
Accounts Receivable Account	The account number for your accounts receivable account.
Income Account Formula	If your organization’s income accounts are not a one-to-one match with your GL codes, you will need to list a formula in this field that generates the correct accounting code. See “Creating Formulas for Accounting Module Fields” page 390 for details.
Filename	The name of the file that DPO will use to export accounting data.

Parameter	Definition	
Detail or Summary	Select one of the following:	
	Detail	The data will contain each gift entry transaction as a separate record.
	Summary	The data will be totaled up for each income account. One record will be generated for each income account that lists the total from all gifts.
Include Pledges	Check to include pledge data with the transactions. You must enter the accounts receivable code in the A/R Account Code field.	
Repeat End Transaction	Some versions of QuickBooks need the ENDTRNS line in the import file repeated after each transaction record, and some versions only need it at the after the last transaction. Check this option to repeat the transaction marker after each transaction. If unchecked, it will appear after the last transaction in the file.	
Auto Transfer	Check to use the Auto Transfer client to transfer accounting data to the accounting software.	

Click **Save** to retain the changes made.

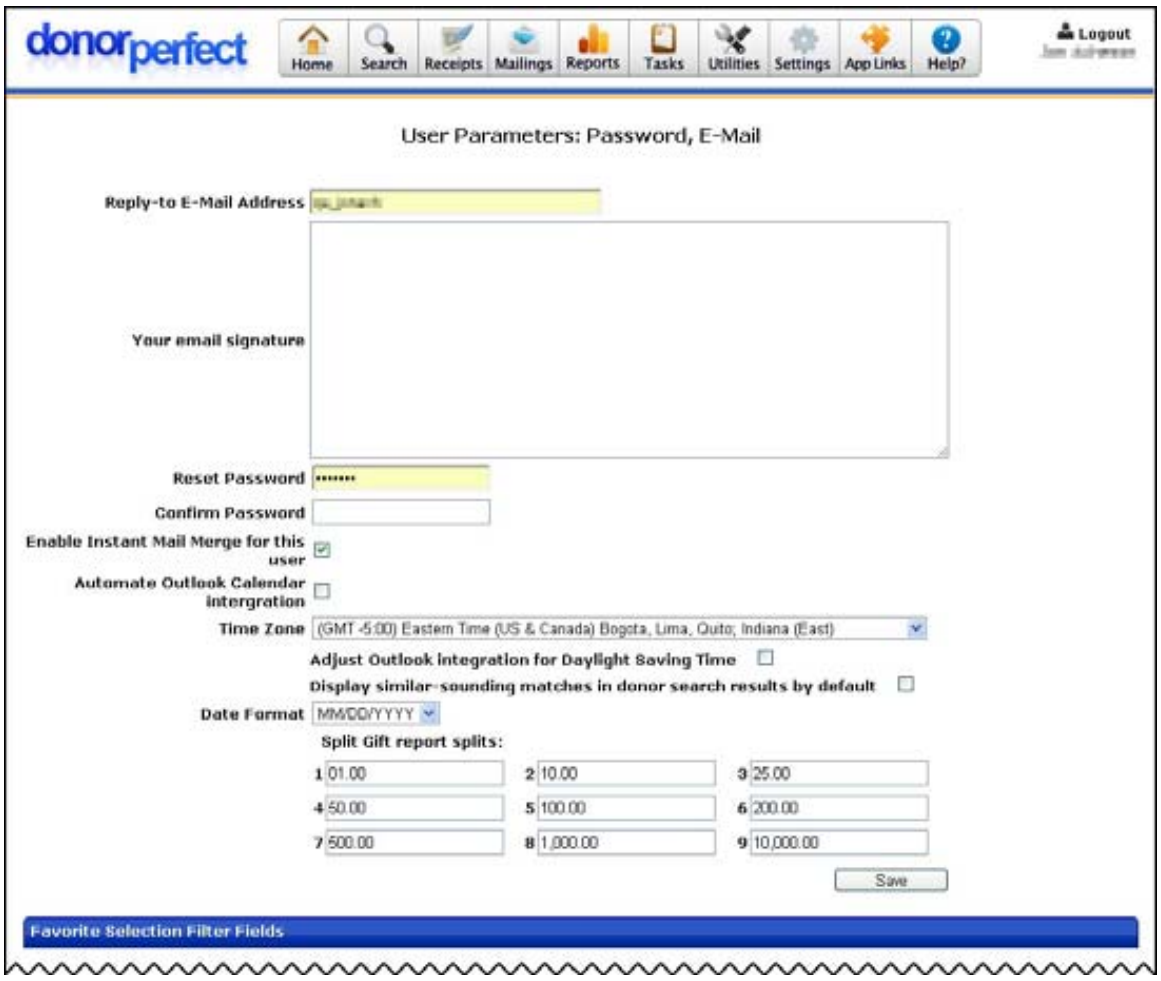
Creating Formulas for Accounting Module Fields

For some organizations, the accounting software income accounts, or the cash accounts, are not a one-to-one match with the GL codes. If this is the case, you must enter a formula that defines the make-up of the account code.

Below are examples of such formulas:

Code	Description
`gl + sol`	General Ledger + Solicitation Code
`fund + gl + "00"`	Fund (optional field) + General Ledger + 00
`"00" + code("gl","acctnum")`	00 + General Ledger's Accounting Code entered through Code Maintenance.

User Setting Parameters



You can set any of the following user parameters:

Parameter	Definition
Reply-to E-Mail Address	This sets the return email address to be placed on all email correspondence sent from DonorPerfect Online.
Reset Password	To change a user's password, enter a new password here, and confirm it in the Confirm Password field.
Enable Instant Mailmerge for this user	If selected, allows you to merge donor information into Microsoft Word to create a letter. See page 451 for details on how to use Instant Merge.
Automate Outlook Calendar integration	If you check this box, every time you create a new contact entry, a pop-up will appear asking if you would like to add the entry to your Outlook Calendar.
Time Zone	Choose the time zone that applies to the user.

Note: The Adjust Outlook integration for Daylight Saving Time setting is currently not used.

Parameter	Definition
Display similar-sounding matches in donor search results by default	If checked, the **Include similar-sounding results** check box on the Search screen is checked by default. That check box enables the system to search for results that sound similar to the values you enter but may not be spelled the same way. See page 27 for more details.
Date Format	Select either **MM/DD/YYYY (USA)** date format, or **DD/MM/YYYY (Europe)** format. All date fields in the application will use the selected date format.
Split Gift report splits	Several DPO reports group the total gift counts and amount by the size splits you enter here. In fields **1-9**, enter each dollar amount you want the reports to use to group gifts. 1 is the lowest dollar amount, and 9 is the highest; if you don't want to use all the fields, enter 0 in the fields you don't want to use.
Menu Type	Choose **Tabbed** (tabs of information at the top of the screen) or **Classic** (links to information at the top of the screen).
Favorite Selection Filter Fields	This section of the screen allows you to select the fields that will appear in the **Favorite Fields** list when you create a selection filter. See "Setting Up the Favorite Fields List" on page 173 for details.

Click **Save** to retain the changes made.

Receipt Numbering Setup

When you create the acknowledgment file for gifts (see page 91), you can generate receipt numbers for each gift. This ability can help you with year-end auditing and gift tracking. The **Receipt Numbering Setup** screen allows you to define the conventions you want to use when automatically generating receipt numbers.

▶ To set up receipt numbering

1. Click **Settings**, and then click **Receipt Numbers**. The Receipt Numbering Setup screen appears.

2. Click the **Edit** button. A message appears, asking if you want to edit the setup.
3. Click **OK**. The fields on-screen become available.
4. In the **Prefix** field, enter a prefix you want to assign for each receipt number.
5. To include a group of zeroes at the beginning of each receipt number, enter the number you want to include in the **Max Number of Leading 0s**.

6. Choose which method you want to use for creating receipts:
   - **Use Gift_IDs**: uses the Gift ID as the receipt number.
   - **Use Counter**: uses the number you enter as the starting number for receipts.
7. To preview the receipt numbering, click the **Preview** button.

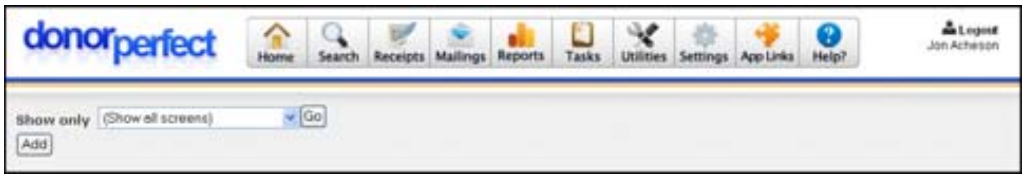
When you're done setting up the numbering, click the **Save** button.

Screen Designer

This section allows you to set up your own fields, choose field parameters, and set up their position on a screen in DonorPerfect.

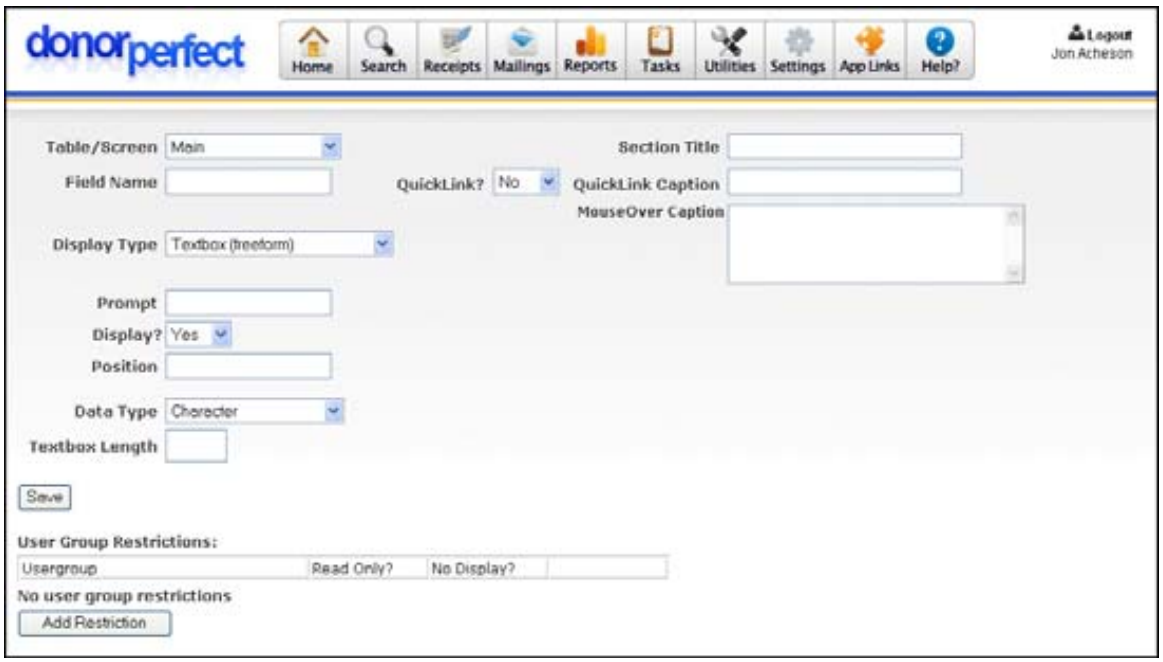
▶ To access user-defined fields

1. Click **Settings,** and then click **Screen Designer.** The Screen Designer screen appears.



2. From the **Show only** pull-down, choose the screen you want to see user-defined fields for, and then click **Go**. A list of user-defined fields appears, allowing you to **Add, Edit,** or **Delete** user defined fields—see the next section for details. For each user-defined field, you see the following information:
   - **Table/Screen Name:** Shows where the user-defined field is located.
   - **Field Name:** This is the field name of the user-defined field as entered in the table.
   - **Field Prompt:** The display title for the field on the screen.
   - **Position:** This determines the position where the user-defined field is on the screen.
   - **Section Caption:** If this field begins a new section, and there is a caption, that caption will be listed here.
   - **Line?:** If a line divides the new section, this will be set to Y.
   - **Display:** If this field is displayed, this will be set to Y.
   - **Restrictions:** If the field has restrictions per user group, those restrictions are shown here.

Add, Edit, or Delete a User-Defined Field



Adding or Editing User-Defined Fields

Use the following instructions to add or edit user-defined fields.

▶ To add or edit user-defined fields

1. Click **Settings**, and then click **Screen Designer**. The Screen Designer screen appears.
2. To add a user-defined field, click the **Add** button**.** To edit an existing field, click the **Edit** link next to the desired field.
3. Complete the following information for the user-defined field:
   - **Table/Screen:** Select the table where the user-defined field will be located. When editing a user-defined field that is on the **Main** or **Bio Screens,** they may now be moved from either page to the other by selecting either **Main** or **Bio** in the **Table/Screen** pull-down. Just change the Screen name.
   - **Field Name:** This is the name of the field in the Table structure.
   - **Display Type:** Defines the type of field to display on the screen. **Textbox (freeform), Memo (scrollable) Pull-down (single select), Checkbox (multi select),** or **Yes/No Option.**
   - **Prompt:** Title of the user defined field as it shows the screen.
   - **Display?:** If **Yes** is selected, the field will display, if **No** is chosen, then the field will not display.
   - **Position:** Entering a number will determine the position (1 – 10, top to bottom).

- **Display Separation Line:** If set to **Yes,** a line will be displayed above the field to separate it from the rest of the screen.
- **Caption to display:** The text you enter here will be displayed above the field.
- **Quick Link:** Select yes to create a quick link at the top of a particular screen to take you directly to a commonly used field.
- **Quick Link Caption:** Type the name of the field you wish to make a quick link for.
- **MouseOver Caption:** The text you enter into this field will be displayed when users hover their mouse pointers over the field. Typically used for a brief explanation of the field.
- **User Group Restrictions:** Add or edit user group restrictions here. User groups must be set up in **Security**. User groups require additional users to be set up. Contact Customer Support to add user groups.

4. If you're creating a field for the Gift or Pledge Screen, users have the option to place the field on both screens simultaneously. Simply check the **Display on both the Gift and Pledge Screens** check box when creating the field.
5. When you're done defining the field, click **Save.**

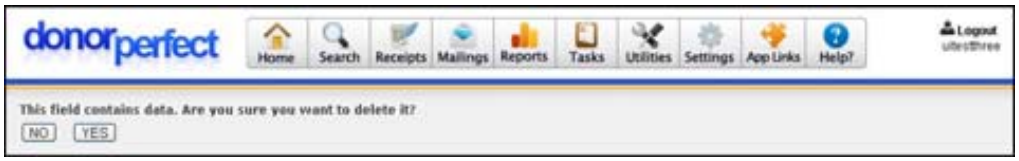
Deleting User-Defined Fields

If necessary, you can delete a user-defined field from your system.

▶ To delete a user-defined field

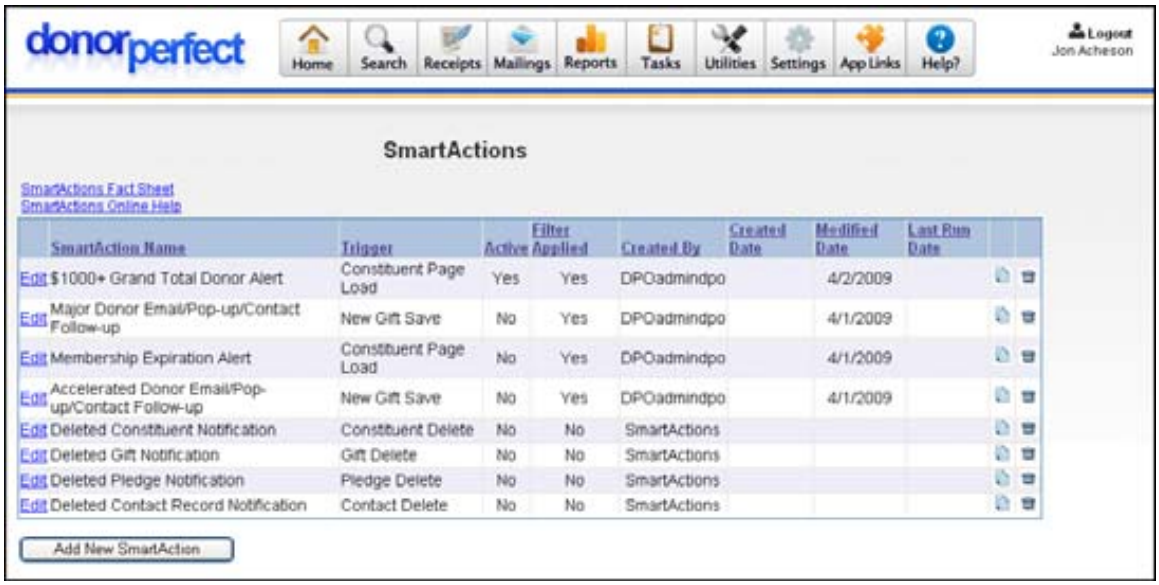
1. Next to the user-defined field you want to delete, click the Delete link. The following message appears:

2. Click **OK** to delete the user-defined field. If the field contains data, you will see a further confirmation screen:



3. Click the **Yes** button to delete the field and its data, or click the **No** button to cancel deletion.

SmartActions Module



The SmartActions module allows you to set up actions that your DonorPerfect Online system will carry out automatically when the specified trigger conditions are encountered. You can set up your system to automatically carry out one or more of the following actions:

- Send out an email notification
- Create a Contact or Other Info record
- Update the value of one or more fields
- Display a popup message
- Open a new browser window and display a specified URL

SmartActions can be set up to trigger whenever you open, create, edit, or save a Donor, Gift, Pledge, Contact, Other Info, or Address record. They can also use selection filters to limit their operation to certain specific records only.

SmartActions operate at the system level. They can be triggered by the actions of any user in the system, unless they are specifically set up to apply to only one user. Once set up, they will function even if you are logged out of the system.

Note: A SmartAction cannot be triggered by another SmartAction. Nor can a SmartAction trigger a Custom Calculation to update.

The SmartActions module is provided free of charge to all users.

To access the SmartActions screen, from the navigation bar, click on **Settings**, then click on **Smart Actions**.

Note: If you don't see SmartActions listed under Settings, you need to enable the SmartActions module. See "Enabling the SmartActions Module," below.

Enabling the SmartActions Module

Before you can use the SmartActions module, you must first enable it in your User Security Settings.

▶ To enable the SmartActions Module

1. In the navigation bar, click the **Settings** button, then click **Security**.
2. Next to your **User ID**, click the **Edit** button.
3. In the Modules section of the screen, check **SmartActions**.
4. Click the **Save** button.
5. Log out, and log back into DonorPerfect Online.

Adding a New SmartAction

Each SmartAction consists of the following elements:

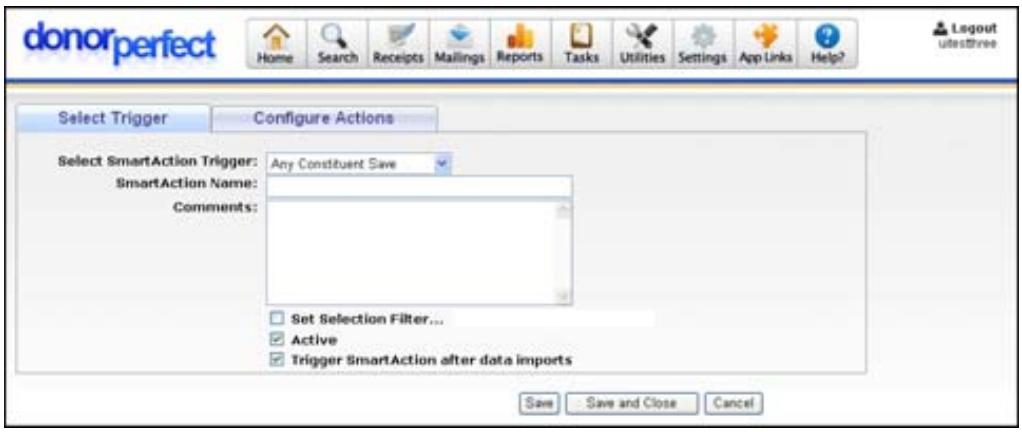
- The *Trigger*, which determines when the DonorPerfect Online system will carry out the SmartAction.
- The *Selection Filter*, which can be used to help limit the instances in which the SmartAction is carried out.
- The *Actions* that the SmartAction carries out when it is triggered.

The Trigger and Selection Criteria work together to determine when the SmartAction will be performed by the system. The way it works is as follows:

1. The trigger action takes place somewhere in the system. For instance, if the trigger is set to New Donor Save, the trigger will go off every time a new donor record is added to the system.
2. Once the trigger action occurs, the system checks the selection filter for the action, effectively saying "Is this the type of action I'm looking for?" If the record that triggered the action matches the selection criteria, the SmartAction will perform the Actions you set up.

▶ To add a new SmartAction

1. From the navigation bar, select **Settings** and then select **SmartActions**.
2. Click the **Add New SmartAction** button. The Edit SmartAction screen appears:



3. Select a trigger for the SmartAction.
4. Enter a **Name** for the SmartAction.
5. If desired, you can enter a brief description of the SmartAction into the **Comments** field.
6. Set a selection filter for the SmartAction.
7. Select whether the SmartAction can be triggered by data imports.
8. Configure one or more actions that the SmartAction will carry out when triggered.
9. Click the **Save and Close** button to save the SmartAction and return to the SmartActions screen.

Selecting a Trigger for a SmartAction

The Trigger is an event in the DonorPerfect Online system that will set off the SmartAction when it occurs. For instance, if you set the trigger to Any Donor Save, the action will be triggered any time a donor is added to the system, or changes are saved to an existing donor record.

Triggers operate on a system-wide basis: by default, they will go off any time the specified event occurs within the system, no matter which user was responsible. They cannot be set off by other SmartActions, however.

To set a trigger for a SmartAction, select the desired trigger from the **Select SmartAction Trigger** list. The available triggers are:

Trigger Name	Description
Any Constituent Save	The SmartAction will be triggered every time a new constituent record is added to the system, or an existing constituent record is saved. The SmartAction will trigger for either an individual constituent record or an organization record.
Any Gift Save	The SmartAction will be triggered every time a new gift record is added to the system, or an existing gift record is saved.
Any Pledge Save	The SmartAction will be triggered every time a new pledge record is added to the system, or an existing pledge record is saved.

Trigger Name	Description
Any Contact Save	The SmartAction will be triggered every time a new contact record is added to the system, or an existing contact record is saved.
Any Other Info Save	The SmartAction will be triggered every time a new Other Info record is added to the system, or an existing Other Info record is saved.
Any Address Save	The SmartAction will be triggered every time a new Address record is added to the system, or an existing Address record is saved.
New Constituent Save	The SmartAction will be triggered every time a new constituent record is added to the system. The SmartAction will trigger for either an individual constituent record or an organization record.
New Gift Save	The SmartAction will be triggered every time a new gift record is added to the system.
New Pledge Save	The SmartAction will be triggered every time a new pledge record is added to the system.
New Contact Save	The SmartAction will be triggered every time a new contact record is added to the system.
New Other Info Save	The SmartAction will be triggered every time a new Other Info record is added to the system.
New Address Save	The SmartAction will be triggered every time a new Address record is added to the system.
Existing Constituent Save	The SmartAction will be triggered every time an existing constituent record is saved. The SmartAction will trigger for either an individual constituent record or an organization record.
Existing Gift Save	The SmartAction will be triggered every time an existing gift record is saved.
Existing Pledge Save	The SmartAction will be triggered every time an existing pledge record is saved.
Existing Contact Save	The SmartAction will be triggered every time an existing contact record is saved.
Existing Other Info Save	The SmartAction will be triggered every time an existing Other Info record is saved.
Existing Address Save	The SmartAction will be triggered every time an existing Address record is saved.
Constituent Page Load	The SmartAction will be triggered every time someone visits the Main Entry screen.
Gift Page Load	The SmartAction will be triggered every time someone visits the Gift Entry screen.
Pledge Page Load	The SmartAction will be triggered every time someone visits the Pledge Entry screen.

Trigger Name	Description
Contact Page Load	The SmartAction will be triggered every time someone visits the Contact Entry screen.
Other Info Page Load	The SmartAction will be triggered every time someone visits the Other Info Entry screen.
Address Page Load	The SmartAction will be triggered every time someone visits the Address Entry screen.
Address Delete	The SmartAction will be triggered every time an address record is deleted.
Constituent Delete	The SmartAction will be triggered every time a constituent record is deleted.
Gift Delete	The SmartAction will be triggered every time a gift record is deleted.
Pledge Delete	The SmartAction will be triggered every time a pledge record is deleted.
Contact Delete	The SmartAction will be triggered every time a contact record is deleted.
Other Info Delete	The SmartAction will be triggered every time an Other Info record is deleted.
Batch 2.0 Post	The SmartAction will be triggered every time a user posts a batch of gift and/or pledge entries using the Batch Entry 2.0 module.

Note: The Display Pop-Up Message and Launch Website URL SmartActions are disabled when this trigger is selected.

Warning! For large batches, there may be an increase in processing time while the system generates the emails, creates the transactions, and updates fields. The increased overhead is not expected to be significant but should be considered when creating complex SmartActions for large batches.

Setting a Selection Filter for a SmartAction

The selection filter allows you to make a SmartAction that only runs under the specific conditions you choose.

If no selection filter is set for a SmartAction, it will trigger every time the selected trigger action occurs anywhere in the system.

▶ To set a selection filter for a SmartAction

1. On the **Select Trigger** tab of the Edit SmartAction screen, check **Set Selection Filter**. The standard Choose a Selection Filter screen appears:

2. You can now build a selection filter, or use a previous filter or a saved filter, as you normally would. See "Setting a Selection Filter" page 160 for details.

To remove the selection filter from a SmartAction, uncheck the **Set Selection Filter** box on the **Select Trigger** tab of the Edit SmartAction screen.

Using a Selection Filter to Make a Single User SmartAction

▶ To create a selection filter that makes a SmartAction trigger for one user only

1. Click the **Build New Filter** button.
2. Under **1. Select screen/table to choose fields from**, select **Gift/Pledge**.
3. Under **2. Select field to compare**, select **CREATED_BY (Created By)**.
4. Under **3. Select comparison operator**, select **= exactly equal to**.
5. Under **4. Type in value to lookup**, enter the DPO User ID of the account you want the SmartAction to trigger for.
6. Click the **Done** button.

Using a Selection Filter to Flag Major Donors

You can set up a selection filter to only trigger if the cash amount of the gift is greater than some value. This is useful for identifying a major donation that might call for special handling, for instance.

▶ To create a selection filter that makes a Smart Action trigger for a major donation

1. Click the Build New Filter button.
2. Under **1. Select screen/table to choose fields from**, select **Gift/Pledge**.
3. Under **2. Select field to compare**, select **AMOUNT (Amount of Gift)**.
4. Under **3. Select comparison operator**, select **>= greater than or equal to**.
5. Under **4. Type in value to lookup**, enter the minimum dollar amount for a major donation.
6. Click the **Done** button.

Setting a SmartAction to be Triggered by Data Imports

The SmartActions module can now be set to trigger a SmartAction after a data record is imported using the Import Module. The data import will register as a **Save** action for the type of record that was imported (Gift, Donor, etc.).

Important! Only the Send Email, Update Field, and Create Transaction actions will function for SmartActions triggered by a data import; all other actions will be ignored.

▶ To set a SmartAction so that it can be triggered by a data import

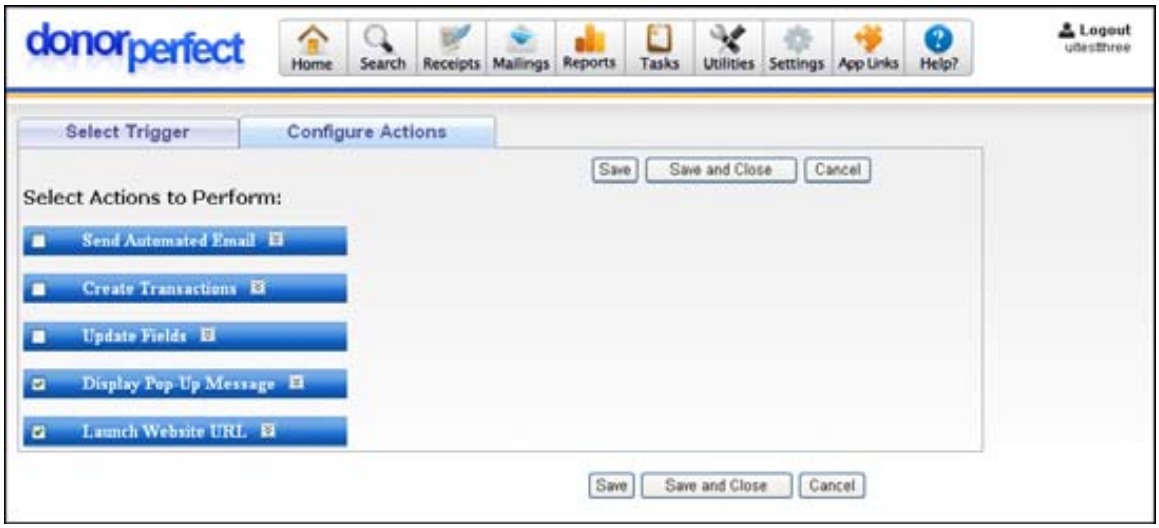
1. Check the **Trigger SmartAction after data imports** box on the **Select Trigger** tab of the Edit SmartAction screen.

For instance, if you want a SmartAction to trigger every time a new constituent is added to the system, whether manually or via the Import Module, you would select the **New Constituent Save** trigger from the Select SmartAction Trigger list, and check the **Trigger SmartAction after data imports** option.

Configuring Actions for a SmartAction

Once it is triggered, a SmartAction can carry out one or more actions.

The actions that will be carried out are specified in the **Configure Actions** tab of the Edit SmartAction screen:



The following actions are available:

- **Send Automated Email** - Sends an email message to a specified address. Fields from the current record can be included in the email message.
- **Create Transactions** - Creates either a new Contact record, or a new Other Info record.
- **Update Fields** – Allows you to assign values to one or more fields in the current record.
- **Display Pop-Up Message** - Displays a pop-up message to the current user.
- **Launch Website URL** - Opens a specified URL in a new browser window.

Note: SmartActions are not designed to carry out a sequence made up of multiple actions. If more than one action is specified for a SmartAction, the system will carry out all the actions simultaneously.

Note: The Display Pop-Up Message and Launch Website URL SmartActions are disabled when the Batch 2.0 Post trigger is selected.

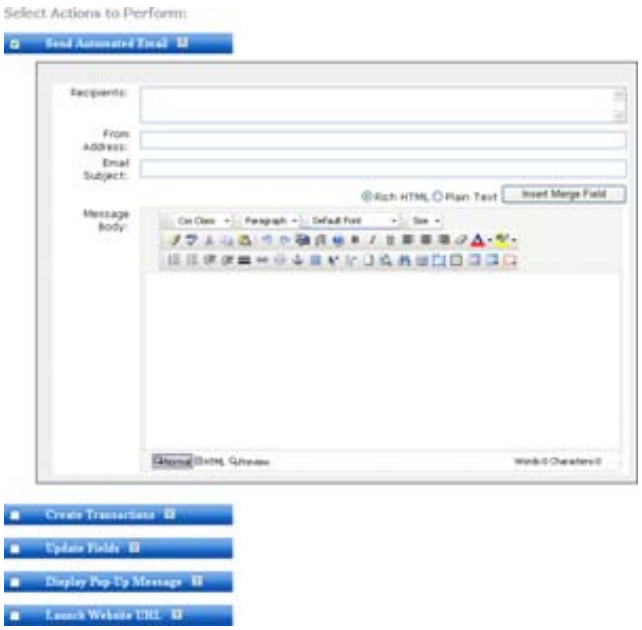
Collapsing and Expanding Action Headings

Each of the actions in in the **Configure Actions** tab has a heading which you can check to enable the action.

You can also click on the heading to toggle the action between a collapsed state, in which only the heading is displayed, and an expanded state, in which you can see the various settings that are specific to the action.

Collapsed

Expanded



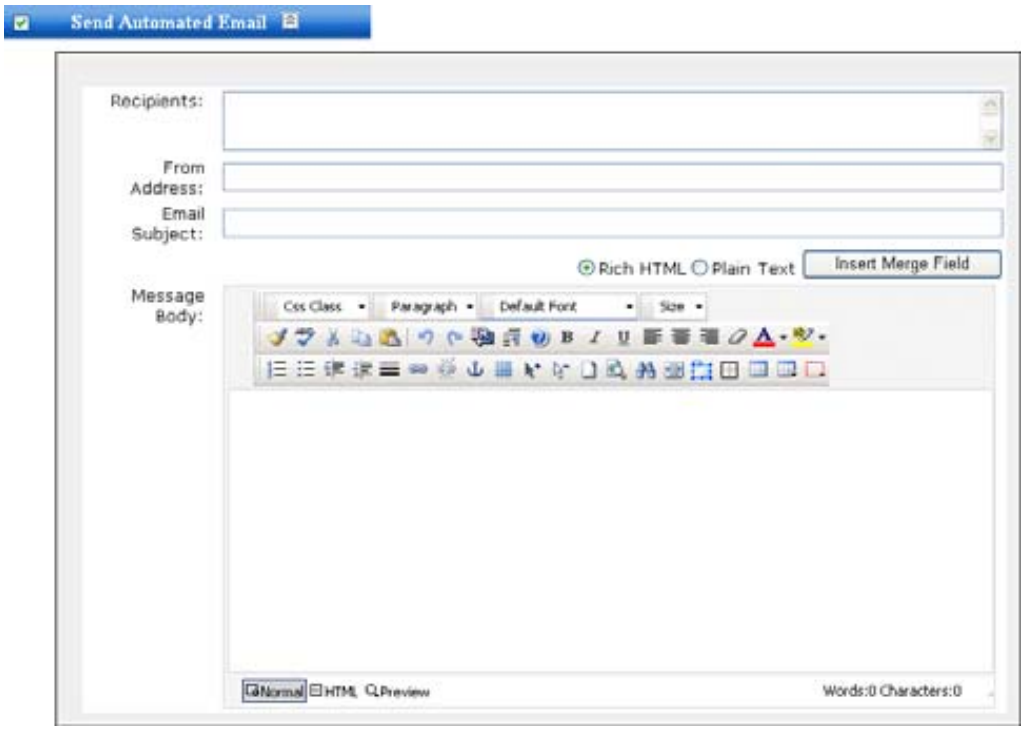
Configuring a SmartAction that Sends an Automated Email

The Send Automated Email action sends an email message to a specified address when the SmartAction is triggered.

▶ To configure the Send Automated Email action

1. Check the box marked Send Automated Email on the Configure Actions tab of the Edit SmartActions screen:

   The fields for the email message appear below the checkbox:



2. Fill in the following fields:

Field	Description
Recipients	Enter the email addresses of the persons you want to receive the email. Separate multiple addresses using commas.
From Address	Enter your email address.
Email Subject	Enter the subject line of the email message that you want to send.
Message Body	Enter the contents of the email message that you want to send. Select Rich HTML or Plain Text format.

3. When finished entering the email message, click the **Save** button to save your changes.

Note: Fields from the current record can be included in the email message. See "Including the Contents of DonorPerfect Online Fields in SmartActions" page 409 for details.

Configuring a SmartAction that Creates a Transaction Record

The **Create Transactions** action creates either a new Contact record, or a new Other Info record.

▶ To configure the Create Transactions action

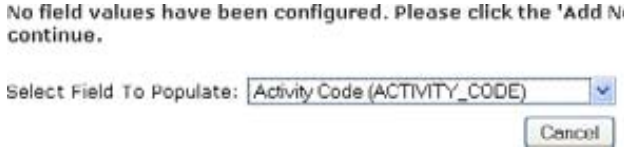
1. Check the box marked **Create Transactions** on the **Configure Actions** tab of the Edit SmartActions screen:

The controls to create the new transaction appear below the checkbox:

2. Set **Type of Transaction to Create** to either **Contact Record** or **Other Info Record**. Additional fields appear below:

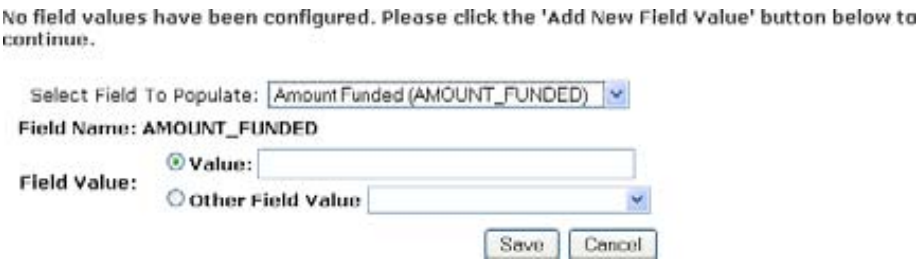
3. Specify the values you want to enter into the fields from the new contact or Other Info record:

   a. Click the **Add New Field Value** button to specify a field to update:



   b. Select the field you want to enter a value into from the **Select Field to Populate** list. Additional fields will appear based on what type of field was selected:

      i. If a normal text/numeric field was selected:

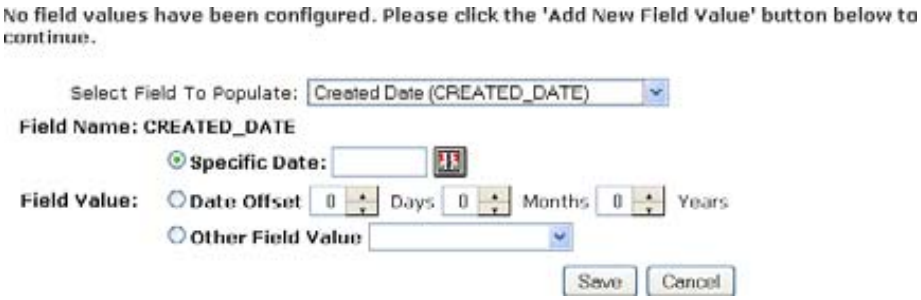


- To specify a value to enter into the field, select **Value** and enter the value into the **Value** field.
- To enter a value from another field into the field, select **Other Field Value** and select the field from the **Other Field Value** list.

ii. If a coded field was selected:

- To specify a value to enter into the field, select **Value** and enter the value into the **Value** field, or click the button to select the value from a list.
- To enter a value from another field into the field, select **Other Field Value** and select the field from the **Other Field Value** list.

iii. If a date field was selected:



- To specify a date to enter into the field, select **Specific Date** and enter the value into the **Specific Date** field.
- To specify the date as being some number of days before or after the current date, select **Date Offset** and select the number of **Days**, **Months** and **Years** you want to add to the current date when you calculate the offset date.
- To enter a value from another field into the field, select **Other Field Value** and select the field from the **Other Field Value** list.

4. Click the **Save** button to save the record again.

Configuring a SmartAction that Updates Specified Fields

The **Update Fields** action allows you to assign values to one or more fields in the database.

▶ To configure the Update Fields action

1. Check the box marked **Update Fields** on the **Configure Actions** tab of the Edit SmartActions screen:

The controls to create the new transaction appear below the checkbox:

2. Click the **Add New Field Update** button to specify a field to update. Fields appear which allow you to enter the field name and expression:

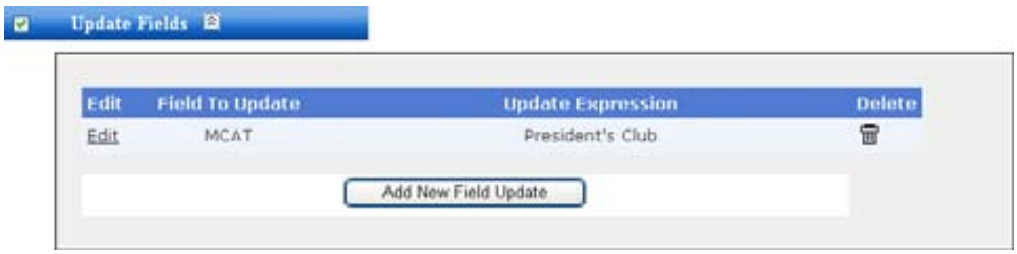
3. Set **Field to Update** to the field you want to specify a new value for.

> **Note:** The fields that are available will depend on the type of record that was selected as the Trigger for the SmartAction. Gift, Pledge, Contact and Other Info fields are only available when a trigger expression of the same type is selected.

4. Enter the value you want to assign to the selected field in the **Expression** field. Click on the button to select a field to use in the expression.

> **Important!** The contents of the Expression field must be a valid SQL value. For instance, if you are setting the expression to be some piece of text, it must be enclosed in single quotation marks. References to fields do not require quotation marks, and neither do numerical values.

5. When finished setting up the field, click the **Save** button to save your changes. A new record will appear for the field:



6. If desired, you can repeat steps 2-5 to add additional fields that will be updated when the action is triggered.

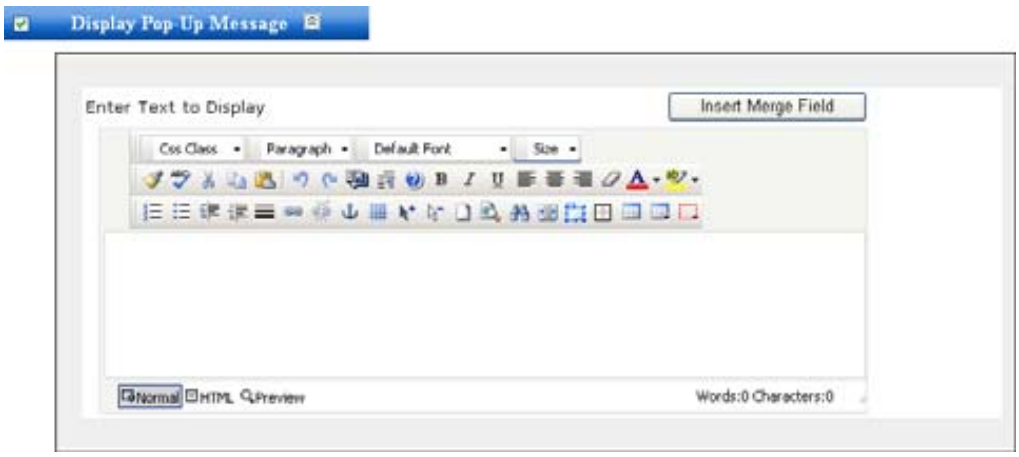
Configuring a SmartAction that Displays a Pop-Up Message

The **Display Pop-up Message** action causes a pop-up message to appear on the screen.

▶ To configure the Display Pop-Up Message action:

1. Check the box marked **Display Pop-Up Message** on the **Configure Actions** tab of the Edit SmartActions screen:

The field for the pop-up message appears below the checkbox:



2. Type the text that you want the pop-up message to display into the field provided. You can apply HTML formatting to the message text.
3. When finished entering the message, click the **Save** button to save your changes.

Note: Fields from the current record can be included in the email message. See "Including the Contents of DonorPerfect Online Fields in SmartActions" page 409 for details.

Note: This SmartAction is disabled when the Batch 2.0 Post trigger is selected.

Configuring a SmartAction that Opens a URL in a New Browser Window

The **Launch Website URL** action opens a specified URL in a new browser window.

▶ To configure the Launch Website URL action

1. Check the box marked **Launch Website URL** on the **Configure Actions** tab of the Edit SmartActions screen:

The field for the URL appears below the checkbox:

2. Type the URL that you want to open in a new browser window into the field provided.
3. When finished entering the URL, click the **Save** button to save your changes.

Note: Fields from the current record can be included in the email message. See "Including the Contents of DonorPerfect Online Fields in SmartActions" page 409 for details.

Note: This SmartAction is disabled when the Batch 2.0 Post trigger is selected.

Including the Contents of DonorPerfect Online Fields in SmartActions

The **Send Automated Email**, **Display Pop-Up Message**, and **Launch Website URL** actions allow you to include the contents of fields from the current record in your emails, pop-up messages, and URLs.

Fields appear in the format **%%*TABLENAME.FIELDNAME*%%**. For instance, the Salutation field appears as **%%DP.SALUTATION%%**.

Warning! For a Launch Website URL SmartAction, you must always use ## delimiters for the field instead of %%. Using %% in the URL field of a Launch Website URL SmartAction will prevent the website from launching.

For instance, to set up a SmartAction to Google for new constituents' names, you would enter the following into the URL field:

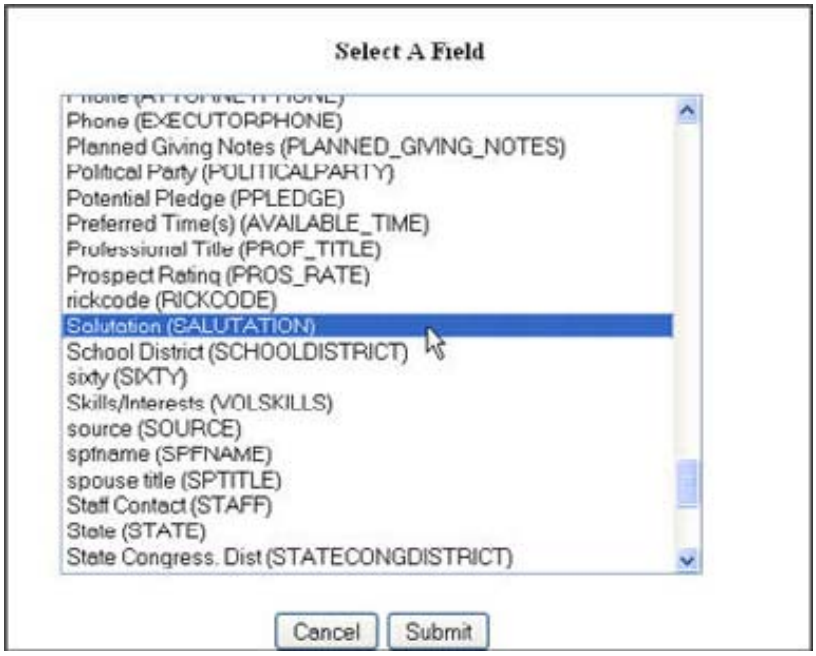
```
http://www.google.com/search?q=##DP.FIRST_NAME##+##DP.LAST_NAME##
```

You can add field codes to your actions in two ways: the easy way, using the Insert Merge Field button to insert the codes for you, or the hard way, by typing the field codes in by hand.

Inserting Field Codes using the Insert Merge Field Button

▶ To insert a field code using the Insert Merge Field button

1. Place the cursor where you want the field code to appear.
2. Click the **Insert Merge Field** button. The Merge Fields Lookup screen opens:



3. Select the field whose contents you want to appear in the email, message or URL.
4. Click the **Submit** button. The field codes for the selected field will be inserted into your text:

Entering Field Codes by Hand

You can also enter codes into action text by simply typing in the code. Codes follow the syntax **%%*TABLENAME.FIELDNAME*%%**.

Editing SmartActions

The SmartActions Module allows you to edit your SmartActions after they have been created.

▶ To edit a SmartAction

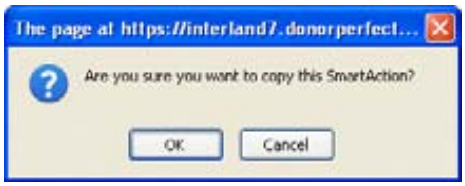
1. From the navigation bar, select **Settings** and then select **SmartActions**.
2. On the SmartActions screen, click the **Edit** link next to the SmartAction you want to edit. The Edit SmartAction screen reopens.
3. Edit the settings for the SmartAction. The rules for this are the same as for when you created the SmartAction.
4. Click the **Save and Close** button to save your changes and return to the SmartAction screen.

Copying SmartActions

The SmartAction screen allows you to make a copy of a SmartAction.

▶ To copy a SmartAction

1. From the navigation bar, select **Settings** and then select **SmartActions**.
2. On the SmartActions screen, click the link next to the SmartAction you want to edit. A confirmation screen appears:



3. Click the **OK** button to create a copy of the SmartAction. It will be given the default name **Copy of [original name]**.

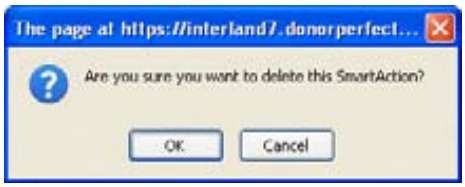
Once created, the copy can be edited and renamed like any other SmartAction.

Deleting SmartActions

The SmartAction screen allows you to delete SmartActions.

▶ To delete a SmartAction

1. On the SmartActions screen, click the link next to the SmartAction you want to delete. A confirmation screen appears:



2. Click the **OK** button to delete the SmartAction.

Setting a SmartAction to be Inactive

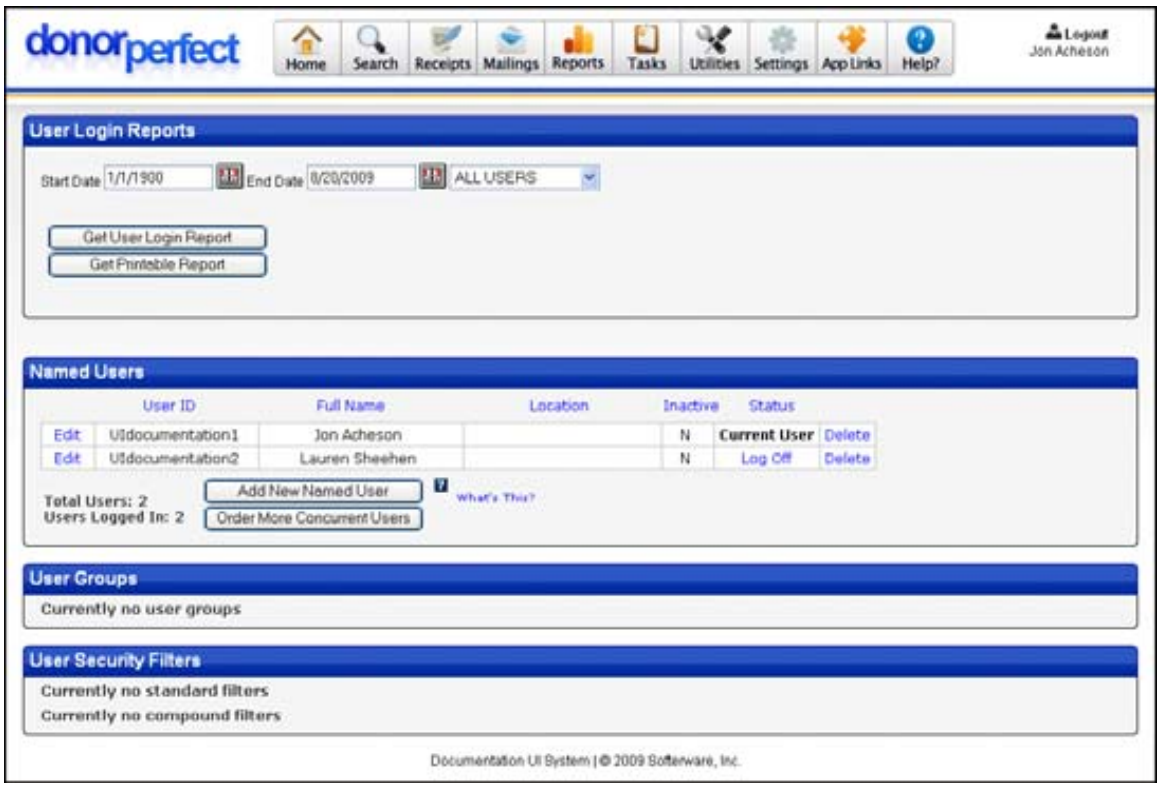
You can set a SmartAction to be inactive. An inactive SmartAction remains in the system, but will never trigger.

▶ To set a SmartAction to be inactive

1. From the navigation bar, select **Settings** and then select **SmartActions**.
2. On the SmartActions screen, click the **Edit** link next to the SmartAction you want to make inactive. The Edit SmartAction screen reopens.
3. On the **Select Trigger** tab of the Edit SmartAction screen, check **Inactive**.
4. Click the **Save and Close** button to save your changes and return to the SmartAction screen.

User Security Administration

From the User Security screen, you can review the security settings of individual users. Administrators may view a report of which users are currently online as well as a report of the login history for your organization including timestamps and IP addresses.



▶ To review the security settings

1. From the navigation bar, select **Settings**, and then click on **User Security**.
2. Review any of the following settings:
   - **Get User Login Report:** Click this button to get a report of users, their login/logout timestamps and IP addresses.
   - **Get Printable Report:** Click this button to get the printable Login Report.
   - **Named Users:** This section details each user ID, their full name, the location they work from, if they are inactive, and their current login/logout status. Administrative users may log out active users by clicking the **Log Off** link. You may also add new users (see "Adding New Users" page 414), determine the current number of concurrent user licenses (see "Determining the Number of Concurrent User Licenses You Currently Have" page 416) or add new concurrent user licenses (see "Ordering More Concurrent User Licenses" page 417).
   - **User Groups:** This section lists each user group that is set up for your system. User groups enable administrators to quickly assign security rights to new users as well as change rights for existing users. To add a user to a User

Group, click the Edit link beside the user, and add them to the relevant User Group.

- **User Security Filters:** Here both simple and compound filters are listed, including filter ID and name. Filters may be edited or deleted from this screen.

Defining User Settings

For each user in your system, you can specify passwords, location, time zone, and the areas of the system you want them to have access to.

▶ To define user settings

1. Click **Settings**, and then click **User Security**.
2. Click the **Edit** link next to the user you want to customize settings for.
3. Make changes to any of the following **User Information** settings:
   - **User ID**: the ID for the user (for example, initials).
   - **New Password**: To enter a user's password, enter a new password here, and confirm it in the **Confirm Password** field.
   - **Full Name**: the name of the user.
   - **Location**: the location of the user.
   - **Time Zone**: choose the time zone the user is in.
   - **Default User Currency**: Select the type of currency that is selected by default. This setting also determines the currency that will be used in reports. This setting is only visible when Multi-Currency Tracking is enabled. See "Multi-Currency Tracking" page 434 for details.
   - **User Group?** This option determines whether the current record is an individual user, or a user group.
   - **Inactive?** If checked, the current record will become inactive. It will remain in the system, but the user will not be able to log in.
4. Set the following under **Security Filters**:
   - **Set User Security Filter**: allows you to restrict which donors a user can see using a selection filter. To set this, click this check box, and then define the filter you want to use. For example, you may want to limit a user to seeing only donors in Pennsylvania or those that are not flagged as major donors. If you set a filter here, it is enforced on the Look Up screen and in reports.
   - **Set Gift-Level Security Filter**: allows you to restrict which gifts the user can see using a selection filter. To set this, click this check box, and then define the filter you want to use. For example, you may want to limit the user to seeing only gifts that are less than $100. If you set a filter here, it is enforced anywhere in the system where gift information appears.

- **Set Contact-Level Security Filter**: allows you to restrict which contacts the user can see using a selection filter. To set this, check the check box, and then define the filter you want to use. For instance, you may want to limit the user to seeing only contacts in the regions that they cover. If you set a filter here, it is enforced anywhere in the system where contact information appears.

5. At the bottom of the screen, there is a list of the different areas of the system and the components that make up those areas—**Entry Screens**, **Mailings**, **Reporting**, **Tasks**, **Utilities**, **Settings** and **App Links**. For each of these areas, you have different options on the type of access you can set:

   - **View**: ability to view that area of the system.
   - **Edit**: ability to edit the information in that area of the system.
   - **Delete**: ability to delete records in that area of the system.
   - **Run**: ability to run a report.
   - **Access**: ability to access and use a function/screen.
   - **Post**: ability to post batches in Batch Entry 2.0.

Note: To check all the options in a given area, click the Select All button. To uncheck all the options in an area, click the Select None button.

6. If you want to assign a user to a group with specific permissions you've defined, choose the group in the **User Group** section, and then click the **Apply Group Permissions** button.
7. When you're done defining settings for the user, click the **Save** button.

Adding New Named Users

You can easily add new named user accounts to the system. The number of users that can be logged into the system simultaneously is limited to the number of concurrent user licenses you have purchased.

▶ To add a new user account to the system

1. From the navigation bar, select **Settings**, then click **User Security**.
2. Click on the **Add New Named User** button in the Security screen. The following screen appears:

3. Enter a **User ID** for the new user.

4. Enter a **Password** for the new user, and enter the same password a second time in the **Confirm Password** field.

> **Important!** The entries in the Password and Confirm Password fields must be identical.

5. Enter the **Full Name** of the new user (ex: **John Q. Smith**).
6. Enter the standard user security settings for the new user. See "Defining User Settings" page 413 for details.
7. Click the **Save** button to save the settings for the new user and return to the Security screen.

Determining the Number of Concurrent User Licenses You Currently Have

The following steps allow you to determine how many concurrent user licenses you currently have.

▶ To determine the number of concurrent user licenses

1. From the navigation bar, select **Settings**, then click **User Security**.
2. Click on the **Order More Concurrent Users** button in the Security screen. The following screen appears:

3. The screen lists the number of concurrent user licenses you have (**Current Simultaneous users allowed**), as well as the number of named users in the system.
4. Click the **Cancel** button to return to the Security screen.

Ordering More Concurrent User Licenses

Adding additional concurrent user licenses allows more users to log into the system at the same time.

▶ To add more concurrent user licenses

1. From the navigation bar, select **Settings**, then click **User Security**.
2. Click on the **Order More Concurrent Users** button in the Security screen. The following screen appears:

3. Enter the number of concurrent licenses that you want to add to your system in the Number of concurrent users to add.

Important! There will be an additional monthly charge for each concurrent user license you add to your system.

4. Enter your full name in the **Your name** field.
5. Enter your email address in the **Your email** field.
6. Check the box signifying that you understand and consent to the legal conditions associated with purchasing additional licenses.
7. Click the **Submit** button to add the requested number of concurrent licenses to your system and return to the Security screen, or click the **Cancel** button to cancel out of adding licenses.

Restricted Login Security

An IP address is a numerical address used to identify each computer on a TCP/IP network. IP addresses are normally written in dotted decimal notation, as four numbers between 0 and 255, separated by periods, such as **192.168.0.1** or **10.0.0.42**.

DonorPerfect Online has the ability to restrict login privileges to certain IP addresses. Once this is enabled, only computers at the specified IP addresses are allowed to log into DonorPerfect Online.

Once IP Security has been turned on, there are two ways to set up which IP addresses are allowed to log in:

- You can define global IP addresses that are allowed to log into any account.
- You can specify individual IP addresses that are allowed to log into any one user account.

You can also enable certain accounts to override all IP security, so that if your local IP addresses change, you can still get into the system. This is appropriate for an administrator account, for instance.

Determining a Computer's IP Address

The simplest way to determine a computer's IP address is to browse to a website such as http://www.whatismyipaddress.com. The website will tell you what your IP address is.

You can also ask your local area network administrator for help with this issue.

Note: On some local area networks, a new IP address is dynamically assigned to a computer each time it is rebooted. If this is the case, you must either define all possible IP addresses, or stop using IP Security.

Enabling IP Security

▶ To enable restricted login by IP address

1. In the navigation bar, click **Settings**, then **Parameters**.
2. In the Parameters screen, click **General Parameters**.
3. Check **Enable IP Security**.
4. Click the **Save** button.

Warning! Once you enable IP security, you should IMMEDIATELY set up your allowed IP addresses, or set up an administrator account that overrides IP security. This will prevent your being locked out of the system.

If for some reason you turn on IP security, and log out without defining any allowed IP addresses, you will need to contact DonorPerfect Online support in order to get back into the system.

Defining Globally Allowed IP Addresses

Globally allowed IP addresses are allowed to log into any account on your DonorPerfect Online system.

▶ To define globally allowed IP addresses

1. In the navigation bar, click **Settings**, then **User Security**.

   At the bottom of the Security screen, once IP Security is enabled, you will see a section labeled **IP Security (globally allowed IP addresses)**.

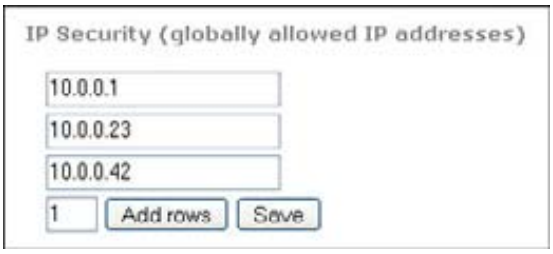
Note: This section is only visible once IP Security is enabled.

2. To add a globally allowed IP address, type it into the field and click the **Save** button.
3. To add more IP address fields:
   a. Enter the number of addresses you want to add in the field next to the Add rows button.

   b. Click the Add rows button.

4. Once you are done entering globally allowed IP addresses, click the **Save** button.
5. To remove an IP address from the list of globally allowed IP addresses:
   a. Delete the contents of the field.

b. Click the Save button. The empty row is removed.



Defining Allowed IP Addresses for User Accounts

You can define a set of IP addresses that are allowed to log into a specific user account, but no other. This can be useful for a user whose IP address is subject to change.

▶ To define IP addresses that are allowed to access an individual user account

1. In the navigation bar, click **Settings**, then **User Security**.
2. Click the **Edit** link next to the user account you want to define allowed IP addresses for.
3. Find the IP Security section of the user account page.

Note: This section is only visible once IP Security is enabled.

4. To add an IP address that is allowed to access this account only, type it into the field and click the **Save** button at the bottom of the screen.

Adding additional addresses and removing addresses works the same as with the global addresses above.

Setting a User Account to Override IP Security

You can enable a user account to override all IP security, so that it can be logged into from any IP address. This is appropriate for an administrator account, for instance.

▶ To set a user account to override IP security

1. In the navigation bar, click **Settings**, then **User Security**.
2. Click the **Edit** link next to the user account you want to override IP security for.
3. In the IP Security section of the user account screen, check **Override All Restrictions**.

4. Click the **Save** button at the bottom of the screen.

11. Application Links

The App Links section of the navigation bar allows you to access other related online applications.

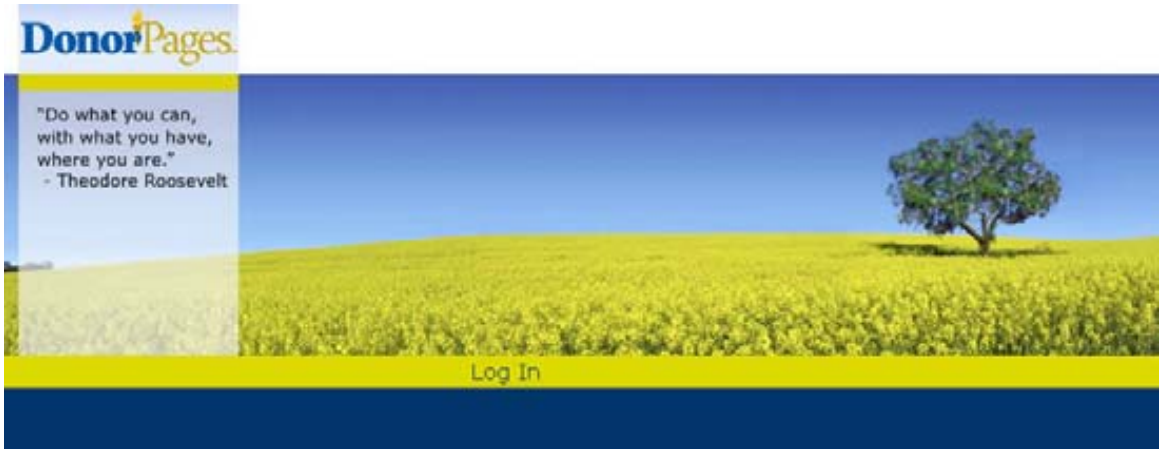
Constant Contact

Clicking on the **Constant Contact** link in the **App Links** section of the navigation bar opens up the Constant Contact home page in a separate browser window.

Constant Contact® provides an easy, affordable way to expand your e-mail database of website visitors and donors. Use this service to create and send professional HTML e-mail newsletters, solicitations, or constituent alerts—and to measure the success of your campaigns.

DonorPages

Clicking on the **DonorPages** link in the **App Links** section of the navigation bar opens up the DonorPages login screen in a separate browser window.



DonorPages is a web-based tool that provides non-profit organizations with innovative, online fundraising tools. Using DonorPages, non-profits can:

- Empower supporters to raise money via personalized web pages that can process online credit card and bank debit donations
- Expand their database by cultivating new donors using captured contact information
- Reduce extra data entry due to seamless integration with DonorPerfect

Processing Gateway

Clicking on the **Processing Gateway** link in the **App Links** section of the navigation bar opens up the SofterWare Gateway Console in a separate browser window.

Note: The Processing Gateway link is only visible for users who have purchased the EZ-EFT module.

The SofterWare Gateway Console is an embedded web interface for the SofterWare Gateway. It is able to display reports on the transactions processed through the Gateway.

Warning! The SofterWare Gateway Console allows access to numerous settings that affect the operation of the SofterWare Gateway. Caution should be exercised in order to avoid making unwanted changes.

TransFirst ePay

Clicking on the **TransFirst ePay** link in the **App Links** section of the navigation bar opens up the TransFirst ePay Secure client login page in a separate browser window.

ePay Secure is a TransFirst suite of proprietary and secure processing solutions specifically designed for "card not present" or non face-to-face merchants. ePay Secure provides the foundation for innovative payment processing solutions for direct marketers.

WealthEngine

Clicking on the **WealthEngine** link in the **App Links** section of the navigation bar opens up the WealthEngine website in a separate browser window.

WealthEngine allows you to screen your donor database using WealthEngine's sophisticated prospect research system.

Activating WealthEngine Profile

WealthEngine Profile is available as additional module; contact your sales representative for details on activation.

Controlling Access to WealthEngine Profile

Access to the WealthEngine Profile feature can be controlled on a per-user basis using the Security screen.

▶ To enable or disable the WealthEngine Profile for a user

1. In the navigation bar, click on **Settings** then **User Security**.
2. Click the **Edit** button next to the user account you want to edit.

3. Under Modules, check the **Access** column check box for **WealthEngine Profile** to allow the user to access the WealthEngine Profile feature, or clear the **Access** check box to deny access.
4. Click the **Save** button to save changes.

WebLink

Clicking on the **WebLink** link in the **App Links** section of the navigation bar opens up the WebLink login screen in a separate browser window.

WebLink allows your organization to securely and efficiently offer online forms for a variety of purposes. WebLink is an Internet-based application that provides highly customizable forms as links from your existing website. The service can collect data and, if you desire, process payments. You can review the signups and then quickly and easily import them into your DonorPerfect Online system.

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12. Help Menu Options

Online Manual

Clicking on the **Online Manual** link in the **Help?** section of the navigation bar opens up the DPO Online Help system in a separate browser window.

The online help for DPO is extensive, and contains all the information found in the printed manual and more. It is not context-sensitive, however, so you will need to browse through the table of contents or the index to find the help topics you want. The organization of the table of contents in the online help is very similar to the organization of the navigation bar in DonorPerfect Online.

Document Library

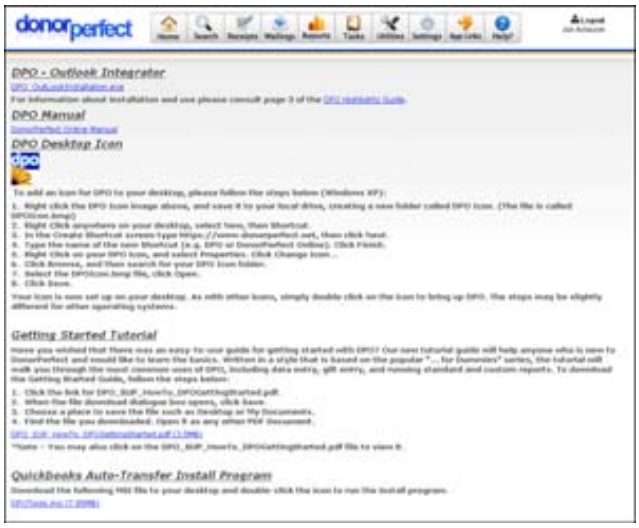
Clicking on the **Document Library** link in the **Help?** section of the navigation bar opens up the Document Library section of the DonorPerfect Client Area website in a separate browser window.

The Document Library provides a wide selection of support documents and training videos for DonorPerfect Online and DonorPerfect Visual Edition.

You may need to enter your Client Area login ID and password in order to access the document library. Please contact SofterWare support if you do not have a Client Area login.

Downloads Page

The **Downloads Screen** contains various documents, icons, and files that are available for download. It is here that the most recent editions of the DonorPerfect Online manual may be found as well as the Getting Started Guide. Select **Help,** and then click **Downloads**. Follow the on-screen directions for downloading the DPO icon. Otherwise, click on the file to download, and save it to your local computer.



Suggestions Form

Clicking on the **Suggestions** link in the **Help?** section of the navigation bar opens up a separate browser window displaying the Suggestion Form that is found in the Client Area of the DonorPerfect website. This provides our users with a way of sending immediate feedback about our products and services. This kind of feedback is often invaluable, so we welcome your suggestions!

You may need to enter your Client Area login ID and password in order to access the form. Please contact SofterWare support if you do not have a Client Area login.

Contact Support Form

Clicking on the **Support** link in the **Help?** section of the navigation bar opens up a separate browser window displaying the Contact Support form that is found in the Client Area of the DonorPerfect website. You can use this form to request help from our DPO support staff.

You may need to enter your Client Area login ID and password in order to access the form. Please contact SofterWare support via phone or email if you do not have a Client Area login.

Training

Clicking on the **Training** link in the **Help?** section of the navigation bar opens up the Training area of the DonorPerfect website in a separate browser window.

This area contains complete and up-to-date information about the training classes and webinars offered by our staff.

User Forum

Clicking on the **User Forum** link in the **Help?** section of the navigation bar opens up a separate browser window displaying the User Forum that is found in the Client Area of the DonorPerfect website. The user forum provides an online discussion area where you can discuss problems, issues and suggestions with the staff of SofterWare, Inc.

You may need to enter your Client Area login ID and password in order to access the user forum. Please contact SofterWare support if you do not have a Client Area login.

13. Additional Modules

This chapter details the additional modules that are available to DonorPerfect Users but are not listed in the navigation bar.

Important: Some of the additional modules are purchased separately. Please contact your account manager for more information.

DPO Accounting Module (Manual Download)

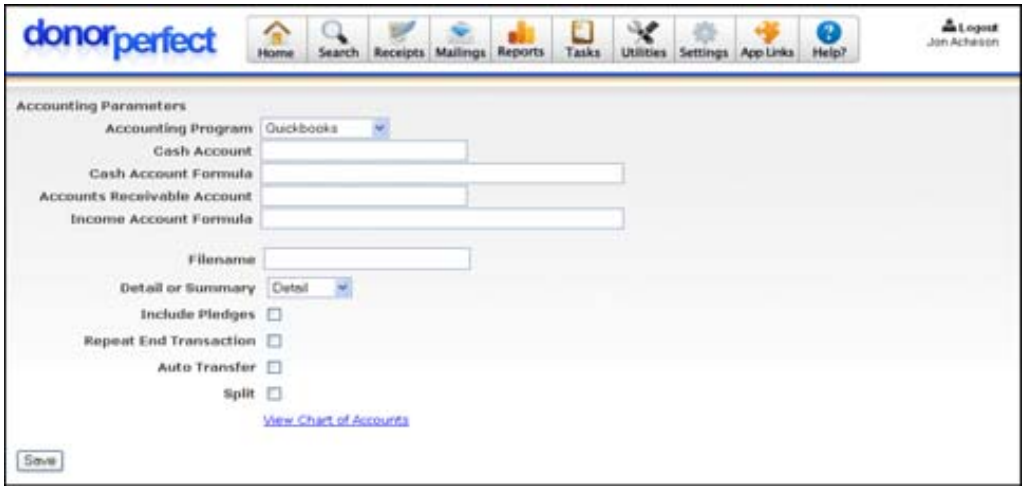
DonorPerfect Online is able to integrate with QuickBooks, MIP and Peachtree. (Other accounting software capability is soon to come.) The sections below will provide instructions on setting up DPO to integrate properly with your accounting software. This is available as additional module; contact your sales representative.

Setting Your Parameters

The first step will allow you to set up your parameters.

▶ To set your parameters

1. Click **Settings**, and then click **Parameters**.
2. Click **Accounting Interface**.



3. For **Accounting Program**, select your accounting software.
4. Choose **Detail** (to show all transactions by person) or **Summary** (to show subtotals by account).
5. Enter the account number for your **Cash Account**.

6. Enter the **Cash Account Formula**. (Only fill in this field with the Cash Account User Defined field name if you have multiple cash accounts. Leave the field blank if you only have one cash account.)
7. Enter the account number for your **Accounts Receivable Account**.
8. Enter the **Income Account Formula**. (Only fill in this field with the Income Account User Defined field name if you have multiple cash and income accounts. Leave the field blank if you only have one cash account.)
9. Enter the **File Name** (it must be in the format of *.iif).
10. Check **Include Pledges** (if applicable).
11. For QuickBooks, check **Repeat End Transaction**.
12. Do not check **Auto Transfer**.
13. Click **Save**.

Setting Up Your Accounting Codes

There are several codes that you must have set up in code maintenance before the Accounting Module will work properly (details on the specified codes to enter are below). These codes can be set up, just like any other code, in the Code Maintenance section of Utilities.

▶ Setting up new codes

1. Click **Settings**, and then click **Code Maintenance**.
2. Click **Add**.
3. Select the **Field Name** (**Account Number** is the name of the field that you are looking for when you are setting up your multiple income account codes).
4. Enter the **Code**.
5. Enter a **Description**.
6. Click **Save** when you are finished with the new code.

▶ Editing Existing Codes

1. Select **Settings**, **Code Maintenance**.
2. Select the desired field from the list in the pull-down box, and click **Go**.
3. Click **Edit** next to the specific code that you want to make the changes to.
4. Enter the updated information.
5. Click **Save** when you are finished.

Just like other codes, it is important that you decide as an organization what format to use for each field in the Accounting Module. The more standardized the codes are, the easier it is to operate the system.

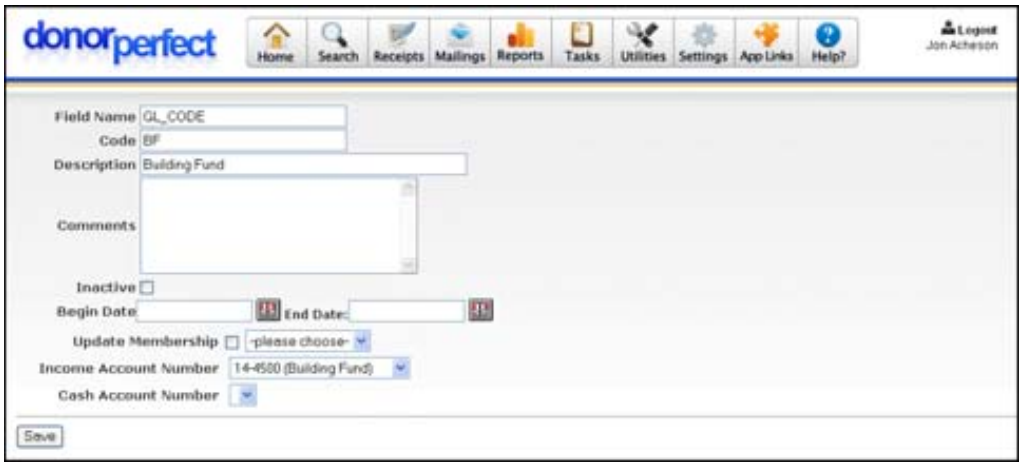
Fields that Must Have Codes Set Up

- **Account Number:** This code can be numbers or letters. For example, GLF2007 or 5000 can be used.
- **Cash Account Number:** Only needed when setting up multiple cash accounts.
- **GL_Code:** Assign your accounting code to each new GL code you create, or edit **ALL** the existing GL codes and add the corresponding accounting codes to them.

Note: Make sure that you have an Account Number code set up for each individual GL Code you have.

▶ To add Income Accounts Numbers to existing GL Code, follow these steps:

1. Select **Settings**, **Code Maintenance**.
2. Select **GL Code** from the list in the pull-down box, and click **Go**.
3. Click **Edit** next to the specific code that you want to make the changes to.



4. Enter the updated information.
5. Click **Save** when you are finished.

Be sure to set up your accounting codes before you attempt to edit or create the GL_Codes. That will ensure that each accounting code will be available when setting up new GL_Codes.

Note: Once your codes are set up, it is very important that during your data entry you assign the proper codes to gifts. Improper coding will yield inaccurate data getting into your accounting software. When entering gifts, the GL_Code MUST be filled in to avoid getting an error when using the Accounting Module.

Downloading Data or Viewing Accounting Reports

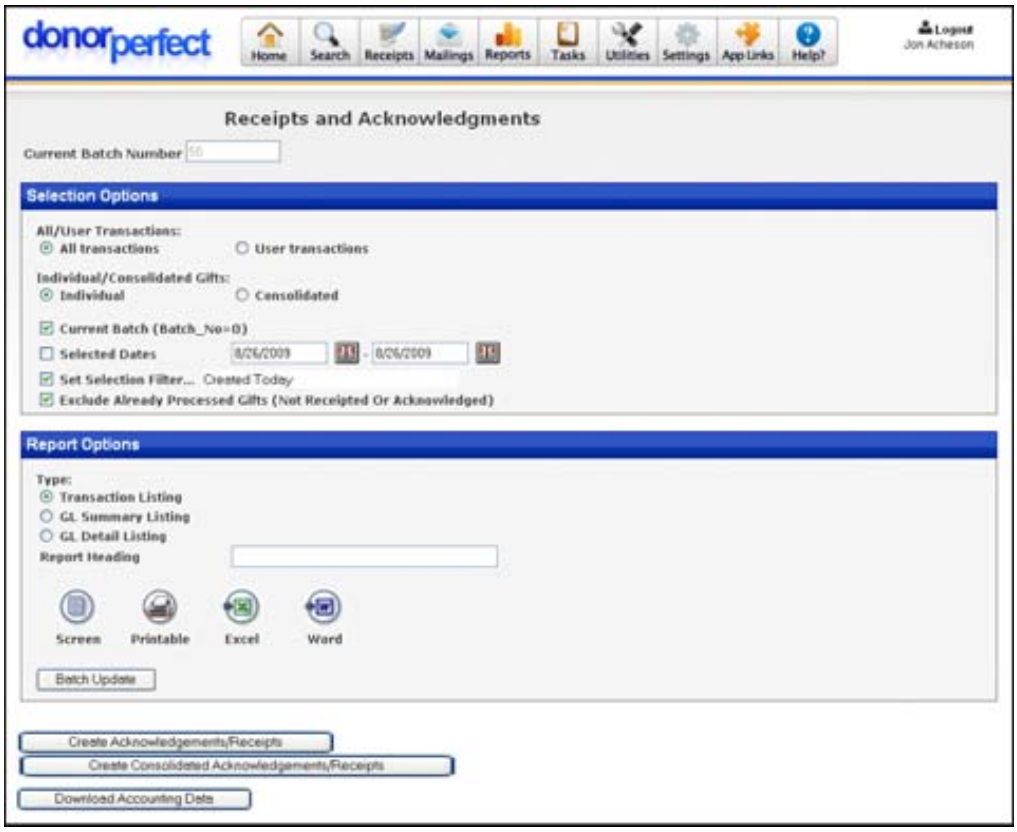
Periodically, you will need to download the data from DonorPerfect Online into your accounting program. You may strictly download the data, or view the data just before the download.

▶ To download the data without viewing a report

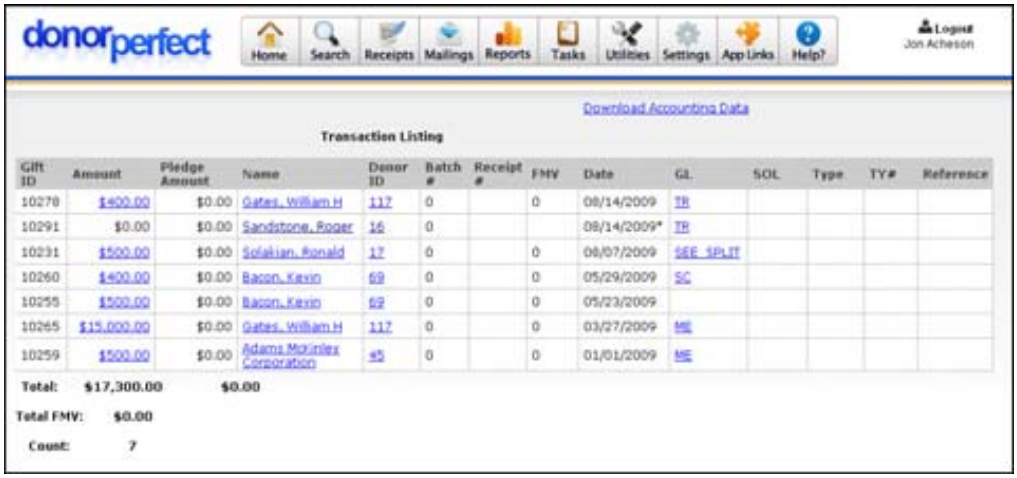
1. In the navigation bar, click on **Receipts**, which will bring up the Acknowledgement/Receipts Screen.
2. Select the appropriate settings, such as **Current Batch**, **Selected Dates**, etc.
3. Click **Download Accounting Data** at the bottom of the screen.
4. Check that the data is in the proper format.
5. Open QuickBooks on your computer, and click **File, Import**.

▶ To view a report and then download the data

1. In the navigation bar, click on **Receipts**, which will bring up the Acknowledgement/Receipts Screen.



2. Select the appropriate settings, such as **Current Batch, Selected Dates,** etc.
3. Click **View** to bring up the **Transaction Listing**.



4. Once you are done viewing the report, click **Download Accounting Data** at the top right portion of the report.
5. Check that the data looks appropriate.
6. Open QuickBooks on your computer, and click **File, Import**.

Insta-Charge Module

Insta-Charge allows you to process one-time donations with a credit card. It's fully integrated into DonorPerfect Online and makes it easy to process credit card gifts. It allows you to process credit card transactions with less data entry, helps ensure that you're using valid credit cards, eliminates the need to reconcile credit card statements with donation records, and protects your donor's confidential data through using a secure process.

Note: If you want to process recurring gifts and pledges with credit cards, you need to use our EFT Module. Contact DonorPerfect support for more details.

See the *DonorPerfect Online Payment Processing Manual* for full details on Insta-Charge.

Multi-Currency Tracking

Multi-Currency Tracking is an optional module that allows DonorPerfect Online users to enter donations in currencies other than the US dollar, and automatically convert the donations into their equivalent in US dollars. Users can also generate reports that list values in other currencies.

At its core, the multi-currency tracking feature works by maintaining a series of currency conversion codes that contain the exchange rates for the various currencies relative to the US dollar over time. These codes are then used to convert international currency values to US dollars according to the following rules:

- Exchange rates cannot be entered by the hour or minute, only for intervals of one or more days.
- The default currency in use by any one user is determined by the **User Currency** setting in the User Security screen. The **User Currency** setting also determines the currency that is used in reports generated by that user.
- Gifts are converted to dollar amounts when they are added to the system, using the exchange rate listed in the system for the Gift Date.
- Pledge amounts are converted to dollar amounts when they are added to the system, using the exchange rate listed in the system for the Pledge Date.
- International currency amounts for reports are generated using the exchange rate listed in the system for the day on which the report was run.
- If no exchange rate is listed for a given date, the system uses the closest previous daily rate that was entered in the system.
- If a currency has no exchange rate entered into the system for any date, the exchange rate is assumed to be **1:1**.

The following international currencies are supported by default:

- Australian Dollar (AUD)
- British Pound (GBP)
- Canadian Dollar (CAD)
- Danish Kroner (DKK)
- Euro (EUR)
- Mexican Peso (MXN)
- New Zealand Dollar (NZD)
- Norwegian Kroner (NOK)
- Sierra Leone Leone (SLL)
- South African Rand (ZAR)
- Swedish Krona (SEK)
- Swiss Franc (CHF)

If you require support for an additional currency that is not listed, it can be provided at additional cost. Contact your service representative for details.

Setting Up Multi-Currency Tracking

The following steps must be completed before you can make use of the multi-currency tracking module:

- Ordering the Multi-Currency Tracking module
- Enabling multi-currency tracking in the General Parameters screen
- Setting the User Currency in the User Security screen

Ordering the Multi-Currency Tracking Module

The Multi-Currency Tracking module is not a standard part of DonorPerfect Online, it must be purchased separately. Contact your sales representative for details.

Once the Multi-Currency Tracking module has been purchased, SofterWare will populate your system with a set of daily currency exchange rates going back to roughly the year 2000. If necessary, you can edit the currency exchange rates: see "Editing Currency Exchange Rates" on page 436 for details.

Enabling Multi-Currency Tracking in the General Parameters Screen

Once you have paid for the additional module, you must enable it in the General Parameters screen before you can begin using its features.

▶ To enable multi-currency tracking

1. In the navigation bar, click the **Settings** button, then click **Parameters**.
2. In the Parameters screen, click **General Parameters**.
3. Check the **Support Multiple Currencies** option.
4. Click the **Save** button.

Setting the User Currency in the User Security Screen

The User Currency setting determines the currency type that will be selected by default on the data entry screens. This setting also determines the currency used by reports.

▶ To set the User Currency

1. In the navigation bar, click the **Settings** button, then click **User Security**.
2. Next to your **User ID**, click the **Edit** button.
3. In the area at the top of the screen, select the currency you want from the **Default User Currency** list.
4. Click the **Save** button.
5. Log out, and log back into DonorPerfect Online.

Editing Currency Exchange Rates

Exchange rates vary with location and many other factors, so you may want to fine tune the exchange rates in the system to match the precise exchange rates you encounter in real life. This can be done using the Code Maintenance screen.

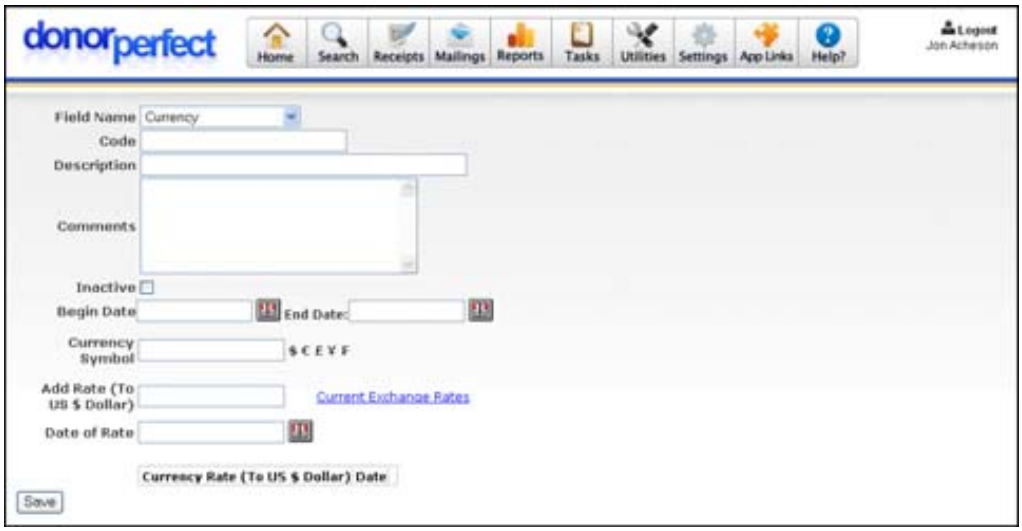
Currency rates are stored in **Currency/Gifts Screen** codes. There is one code for each currency. You can enter or edit the daily currency exchange rates in the Code Maintenance screen for each code.

Adding a Currency Type into the System

▶ To add a new currency type to the system

1. In the navigation bar, click the **Settings** button, then click **Code Maint**. The Code Maintenance screen appears:

2. Set **Show only** to **Currency/Gifts Screen**.
3. Click the **Add** button. A new screen appears where you can enter the details for the new currency:



4. Enter the three-letter abbreviation for the currency type in the **Code** field. Use the official ISO 4217 currency codes (hint: Do an internet search for **ISO 4217**).
5. Enter the name of the currency in the Description field (ex: **British Pound**).
6. If desired, enter notes or other information into the **Comments** field.
7. To deactivate the currency type, check the **Inactive** box. This will prevent the currency type from being selected in data entry screens.
8. Enter the **Begin Date** and **End Date** for the currency, to indicate the date range for which the currency type is valid.

> Note: Typically, the Begin Date and End Date are set far enough into the past and future that you will never hit them. However, you might use the End Date for a currency that becomes obsolete. For instance, the Slovak koruna was replaced by the Euro on July 8, 2008.

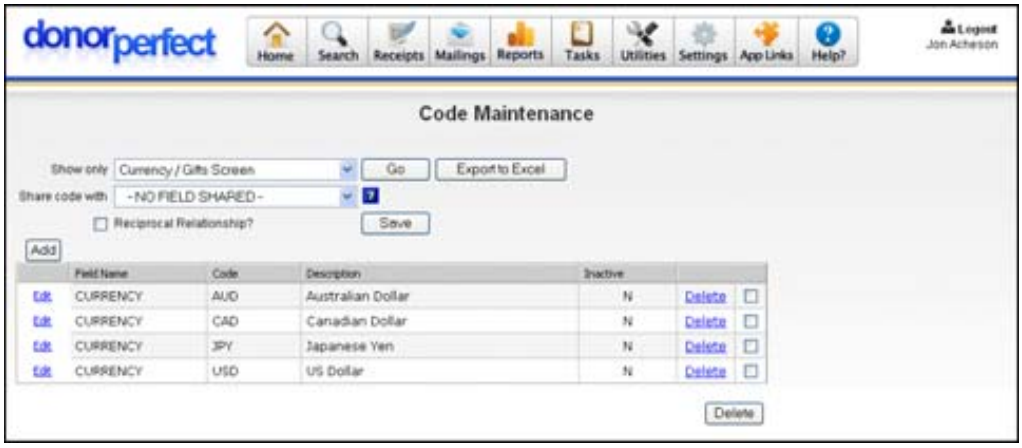
9. Enter the **Currency Symbol** for the currency.
10. Click the **Save** button. The new currency is saved, and the Field Name field becomes non-editable. The screen remains open, however, so that you can enter daily currency exchange rates.

Entering and Editing Currency Exchange Rates

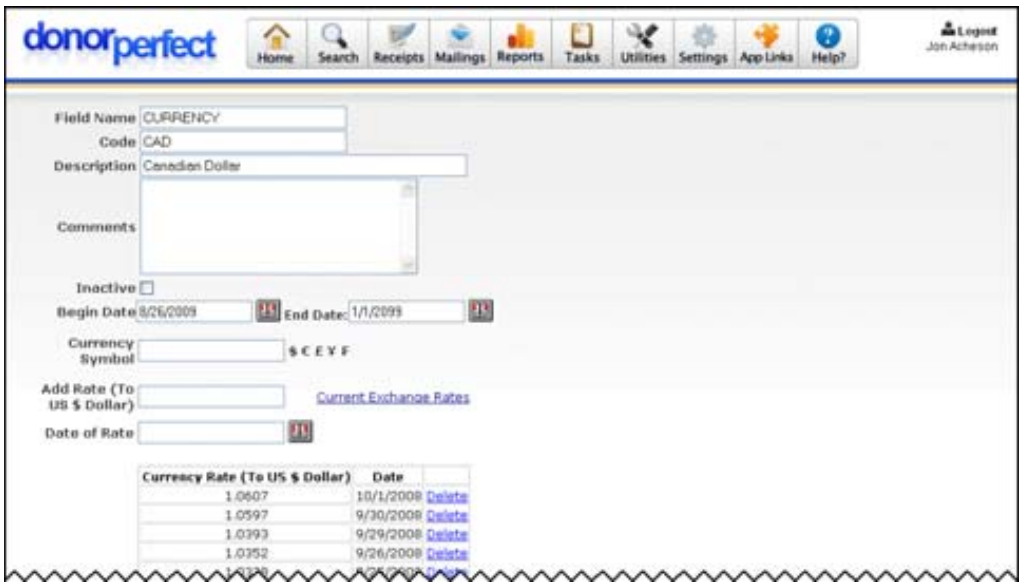
Currency exchange rates can be entered and deleted in the Edit screen for the relevant currency code. If you are already in the Edit screen, skip steps 1-4 below.

▶ To add a new currency type to the system

1. In the navigation bar, click the **Settings** button, then click **Code Maint**.
2. Set **Show only** to **Currency/Gifts Screen**.
3. Click the **Go** button. The currency codes that are entered into your system are listed:



4. Click the **Edit** link for the currency you want to enter/edit exchange rates for. The Edit screen opens for the selected currency code:



The exchange rates for the currency are listed at the bottom of the screen. Exchange rates are specified on a daily basis.

5. To add a new daily currency exchange rate:

   a. Enter the exchange rate for the currency in the **Add Rate (To US $ Dollar)** field. You can click the **Current Exchange Rates** field to visit a website that lists exchange rates.

   b. Enter the date of the exchange rate in the **Date of Rate** field, or click on the calendar icon to select the date.

   c. Click the **Save** button to save the rate and add it to the list at the bottom of the screen.

Warning! If more than one exchange rate is entered for a given currency on a given day, the system will use the first exchange rate that it finds. For best results, be sure to have only one exchange rate listed in the system for any given day.

6. To delete a daily currency exchange rate, click the **Delete** link next to the exchange rate listing.

Once you are done editing currency exchange rates, you can return to the Code Maintenance screen by clicking the **Code Maint.** link in the navigation bar above.

Entering International Currency Values into the System

Once you have enabled multi-currency tracking and fine-tuned your daily currency exchange rates, you can begin entering international currency values in the data entry screens. Once multi-currency tracking is enabled, monetary fields will be replaced by a field for the monetary value, and a list that lets you select the currency type:

▶ To enter an international currency value

1. Select the currency type from the list.

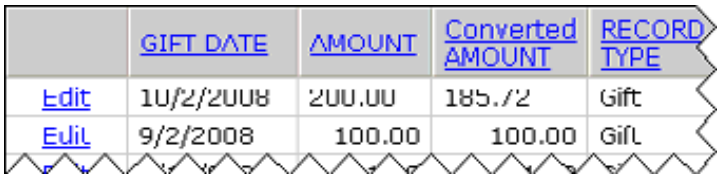
Enter the value in the selected currency into the amount field.

For instance, to enter 20 British pounds, select **GBP** from the list, and enter **20** into the amount field.

How International Currency Values are Displayed

International Currency Values in the Gift List Screen

On the Gift List screen, the international currency values will show up in the **Amount** column, and the value when converted into the User Currency will appear in a new **Converted Amount** column:

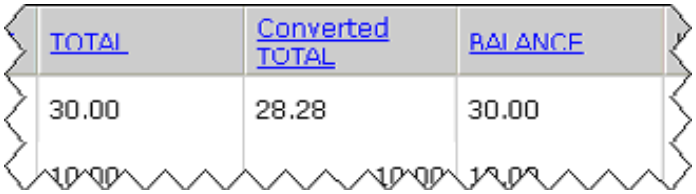


	GIFT DATE	AMOUNT	Converted AMOUNT	RECORD TYPE
Edit	10/2/2008	200.00	185.72	Gift
Edit	9/2/2008	100.00	100.00	Gift

Amounts that were entered in the base currency will have identical values in both columns.

International Currency Values in the Pledge List Screen

On the Pledge List screen, the international currency values will show up in the **Total** column, and the value when converted into the User Currency will appear in a new **Converted Total** column:



TOTAL	Converted TOTAL	BALANCE
30.00	28.28	30.00
100.00	100.00	10.00

Amounts that were entered in the base currency will have identical values in both columns.

International Currency Values in Reports

In Financial reports, all amounts will appear in the User Currency though currency symbols will not be visible. To view the original currency of the gift, drill down to the gift detail level.

Issues and Limitations of Multi-Currency Tracking

When using Multi-Currency Tracking, you should be aware of the following issues and lmitations of the feature:

International Currency Values in Calculated Fields

Auto-Calculated Fields typically calculate aggregate sums from a number of records, such as "The total value of all gifts with a General Ledger code of CC." Unfortunately, it is not possible to take the sum of a number of records and convert it accurately to a different

currency, as each value from the individual records would have been subject to different conversion rates depending on the date of the record.

The solution to this problem is to create a new user-defined field and store the converted values for each record entry there. You can then add up the values from the user-defined field and get an accurate total.

International Currency Values and Selection Filters

DonorPerfect Online selection filters cannot automatically convert international currency values to the base currency of the system before checking the values against the selection filter criteria. This makes creating selection filters for international currency somewhat problematic.

As with calculated fields, the best solution is for the user to create new user-defined fields and store the converted amounts for the international currency values in them. You can then run your selection filters against the user-defined fields and get accurate results.

Appendix A: System Requirements

DonorPerfect Online System Requirements

Microsoft Windows Operating System

Minimum	Recommended
Pentium II/266 Operating Windows 98 and Internet Explorer 5.5	Pentium IV/700 Operating Windows XP and Internet Explorer 6
128 MB of RAM	512 MB of RAM
Super VGA (800 X 600) or Higher Resolution Monitor with 256 Colors	Super VGA (1024 X 768) or Higher Resolution Monitor with 16 bit Color

Table A- 1 Windows System Requirements

Macintosh Operating System

Minimum	Recommended
Any Macintosh Computer Operating Mac OS X 10.2 or Later with Safari 1.0	Any Macintosh Computer Operating Mac OS X 10.3 or Later with 1.2
128 MB of RAM	256 MB of RAM

Table A- 2 Macintosh System Requirements

Accessing DonorPerfect Online

DonorPerfect only requires a browser to access your data.

▶ To access DPO

1. Open your browser (Internet Explorer 6.0 or Safari 1.3.2).
2. In the Address Bar, type https://www.donorperfect.net.
3. Type in your **User ID** and **Password.**
4. Click **Submit**.

If you do not know your User ID or password, please call support.

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Appendix B: Sample Coding

Sample Coding for the Main File

You can set up any codes for any fields you want. Enter the descriptions of each code through **Settings, Code Maintenance**.

Flags

Flag codes define the relationship of a donor with their organization:

VL	Volunteer	ST	Staff
PT	Patient	BD	Board Member
PR	Press	FC	Fiscal Committee
AX	Auxiliary	DC	Deceased Donor

Type of Donor

Donor type codes define the kind of donor that a constituent record represents.

IN	Individual	CO	Company
FN	Foundation	OR	Organization

Sample Coding for Gift File

General Ledger Codes

GL codes define the account that funds from donations will be deposited in.

UN	Unrestricted	BF	Building Fund
SF	Scholarship Fund	ED	Restricted--Education

Campaign Codes

Campaign codes define the fundraising campaign associated with a donation.

SC05	Sample Campaign 2005
SC06	Sample Campaign 2006

Solicitation Codes

Solicitation codes define the various solicitations for donations that your organization uses. They are used to identify the solicitation that led to a donation.

DM06A	Direct Mail (1st of '06)	REN	Renewal Letter
DM06B	Direct Mail (2nd of '06)	GT06	Golf Tourney, '06
NS06A	Newsletter (1st of '06)	MEM	Memorial
AU06A	Auction Ad Book	GRNT	Grant Proposal
AU06P	Auction Item Purchase	PERS	Personal Solicitation
AU06I	Auction Item In-kind	UNS	Unsolicited Gift
AU06T	Auction Tickets		

Sub-Solicitation Codes

Sub-solicitation codes are used to identify the purpose of a gift that resulted from a given solicitation.

SP	Sponsorship	TA	Table Purchase
AD	Ad Book	TI	Individual Ticket

Type of Gift

Gift Type codes identify the type of gift that was given by a donor.

CC	Credit Card transaction	IK	In-Kind
CK	Check	RE	Real Estate
CS	Cash	ST	Stock

Sample Coding for Contact Management File

Activity Codes

Contact management activities

LETT	Write Letter	MEET	Meeting
PHON	Phone Call	REPT	Report Due

Appendix C: Using DonorPerfect with Your Word Processor

DonorPerfect creates three types of mail merge files:

- Regular Mail Merge (Mailings, Mailmerge)
- Acknowledgement Letter File(s) (Reports, Batch Process)
- Pledge Reminder File (Mailings, Pledge Processing)

The default order of entry fields for the Regular Mail Merge are as follows:

donor_id	country	last_contrib_amt	ly6_cytd
last_name	home_phone	ytd	AUTOCALC1
suffix	professional_title	ly_ytd	AUTOCALC2
first_name	business_phone	ly2_ytd	AUTOCALC3
middle_name	fax_phone	ly3_ytd	gift_total
title	mobile_phone	ly4_ytd	gifts
salutation	email	ly5_ytd	max_date
optional_line	org_rec	ly6_ytd	max_amt
address	donor_type	cytd	avg_amt
address2	narrative	ly_cytd	yrs_donated
address_type	nomail	ly2_cytd	created_date
city	nomail_reason	ly3_cytd	created_by
state	initial_gift_date	ly4_cytd	modified_date
zip	last_contrib_date	ly5_cytd	modified_by

The Acknowledgement file includes all the above fields and the following fields:

donor_id	gift_type	ty_letter_no	frequency_desc
record_type	gift_type_desc	ty_letter_no_desc	reminder
gift_id	split_gift	glink	last_bill_date
gift_date	pledge_payment	plink	last_paid_date
amount	first_gift	nocalc	writeoff_date
gl_code	reference	receipt	writeoff_amount
gl_code_desc	memory_honor	ty_date	gift_created_date
solicit_code	memory_honor_desc	total	gift_created_by
solicit_code_desc	gfname	bill	gift_modified_date
sub_solicit_code	glname	balance	gift_modified_by
sub_solicit_code_desc	fmv	delinquent	gift_id
campaign	batch_no	initial_payment	
campaign_desc	gift_narrative	frequency	

The Pledge Reminder File includes all of above fields (Regular and Acknowledgement) as well as the following fields:

current_due	address_type_desc	total_due
donor_type_desc	nomail_reason_desc	state_desc

Note: The fields above are the minimum number of fields in the file. The addition of User Defined Fields will increase the number of fields accordingly.

- **Company/Organization Names:** If the Last name field contains a company or organization name, and the record is set to be an organizational type of record, the organization's name will automatically appear in merge field #8 and the contact person will appear in merge field #2.
- **Title Field:** The title field (the field that holds Mr./Ms. etc.) automatically has a space after it. Therefore, do not place a space in your form letters between fields 6 and 4. That way, if someone does not have a title (for instance, Roger and Mary Sandstone), a space will not print at merge time.
- **Salutation Field:** If the salutation field is left blank, it defaults to the Title+Lname as long as there is something in the title field. If there is nothing in the title field, it defaults to the first name field.

Procedure for Running Mailmerges

This section shows example letters and the procedures for merging with various word processing programs. These letters follow the default mailmerge layouts, so your own letters may be slightly different. The example letters are included with the DonorPerfect program.

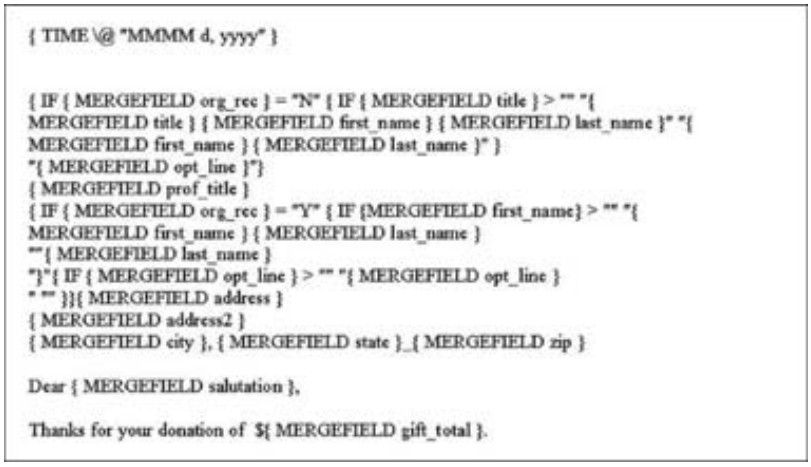
MS Word 2000, Word 97

First, create your mailmerge data file using DonorPerfect Online either through **Mailings** or **Reports, Acknowledgements/Receipts**.

▶ To run mailmerges in Word

1. Open Word for Windows.
2. Choose **File, Open,** and choose the desired letter.
3. Choose **Tools, Mail Merge, Merge..., Merge** (or choose the "Merge to New Document" icon). Make sure the data file is the name of the appropriate DonorPerfect data file (displayed in parentheses below).

Acknowledgement Letter (thankyouletter.doc)



```
{ TIME \@ "MMMM d, yyyy" }

{ IF { MERGEFIELD org_rec } = "N" { IF { MERGEFIELD title } > "" "{
MERGEFIELD title } { MERGEFIELD first_name } { MERGEFIELD last_name }" "{
MERGEFIELD first_name } { MERGEFIELD last_name }" }
"{ MERGEFIELD opt_line }"}
{ MERGEFIELD prof_title }
{ IF { MERGEFIELD org_rec } = "Y" { IF {MERGEFIELD first_name} > "" "{
MERGEFIELD first_name } { MERGEFIELD last_name }
""{ MERGEFIELD last_name }
"}"{ IF { MERGEFIELD opt_line } > "" "{ MERGEFIELD opt_line }
" "" }}{ MERGEFIELD address }
{ MERGEFIELD address2 }
{ MERGEFIELD city }, { MERGEFIELD state }_{ MERGEFIELD zip }

Dear { MERGEFIELD salutation },

Thanks for your donation of  ${ MERGEFIELD gift_total }.
```

MS Word Acknowledgement Letter Template with Field Codes Displayed

WordPerfect for Windows

First, create your mailmerge data file using DonorPerfect either through **Mailings** or **Reports, Acknowledgements/Receipts**.

▶ To run mailmerges in WordPerfect

1. Open WordPerfect.
2. Choose **File, Open,** and choose the desired letter.
3. Choose **Tools, Merge, Merge, Merge** (or press the **Merge** button). The "Form File" is "Current Document" and the "Data File" is the name of the DonorPerfect data file.

4. It then asks for data file conversion. Choose **ASCII Delimited**. Press the up arrow on your keyboard (twice for WP 97, once for WP 6.0), as this appears above the "Ascii Text" option.

Acknowledgement Letter (WPTHANKS) (DP data file: ty1.txt, ty2.txt, etc.)

FIELD(5)FIELD(4) FIELD(2)

FIELD(7)

FIELD(8)

FIELD(9), FIELD(10) FIELD(11)

MS WordPerfect Acknowledgement Letter Sample

Note: Enter fields into your document using Tools, Merge, Field. 2) If the list of data files does not default as "*.txt", choose Edit, Preferences, File, Merge, and set the "Use default data file extension" to .txt.

- All-Purpose Letter (WPLETTER) (data file: **donmrg.txt**)
- Pledge Letter (WPPLEDGE) (data file: **donplg.txt**)

MS Word for Macintosh

First create your mailmerge data file using DonorPerfect either through **Mailings** or **Reports, Acknowledgements/Receipts**.

▶ To run mailmerges in Word for Macintosh

1. Open MS Word for Macintosh.
2. Open the General Mailmerge template.

{ TIME \@ "MMMM d, yyyy" }

{ IF { MERGEFIELD org_rec } = "N" { IF { MERGEFIELD title } > "" "{
MERGEFIELD title } { MERGEFIELD first_name } { MERGEFIELD last_name }" "{
MERGEFIELD first_name } { MERGEFIELD last_name }" }
"{ MERGEFIELD opt_line }"}
{ MERGEFIELD prof_title }
{ IF { MERGEFIELD org_rec } = "Y" { IF {MERGEFIELD first_name} > "" "{
MERGEFIELD first_name } { MERGEFIELD last_name }
""{ MERGEFIELD last_name }
"}"{ IF { MERGEFIELD opt_line } > "" "{ MERGEFIELD opt_line }
" "" }}{ MERGEFIELD address }
{ MERGEFIELD address2 }
{ MERGEFIELD city }, { MERGEFIELD state }_{ MERGEFIELD zip }

Dear { MERGEFIELD salutation },

This is our monthly newsletter. Thanks for reading.

Macintosh Mail Merge Template with Field Codes Displayed

A small box, titled **Data Merge Manager**, should appear on the right-hand side of the screen.

3. Under **Data Source**, select **Get Data**.
4. Choose **Open Data Source** and select the **mailmerge.txt** file.
5. Under **Merge**, choose **Merge to New Document**.

Conditional Statements in Letters

Conditional statements allow you to print certain text if one case exists, and different text if another case exists. For instance, let's say that you print one type of thank you letter if the gift is for the capital campaign, and another type for all other gifts. In the examples below, we are assuming that one letter goes out to donors whose gifts have a General Ledger code of "CC", and everyone else gets a generic thank you. Of course, you can set more than two conditional statements, but we are keeping it simple for these examples. Using conditional statements prevents you from having to work with many different data files; you can place all your names in one file and let the mailmerge do the job of printing different letters to them.

MS Word Letter

Dear {{SAL}},

Thanks for the {{AMT}} you gave to the

MS Word Conditional Statement

This letter employs the If, Then Function. Retrieve these commands by choosing **Insert Word Field, If…Then...Else**.

WordPerfect Letter (version 6.x and higher)

Dear FIELD(6),

Thanks for the FIELD(13) you gave IF(FIELD(14)=CC) to

WordPerfect Conditional Statement

This letter employs the IF, ELSE and ENDIF macro commands. Retrieve these commands through WordPerfect by choosing **Shift+F9, Shift+F9**. The second **IF()** example shows San Diego in quotes because quotes must be used with any comparison string that has a space in it.

Setting up Multiple Acknowledgement Letters

DonorPerfect allows you to print up to 99 different acknowledgement letters. If you need more, see the previous section regarding using conditional statements in a letter.

▶ To set up your letters

1. First, create a list of letter numbers and types of letters. For example:

Letter #	Type of Letter
1	Under $50 gift
2	Over $50 gift
3	Memorial
4	Capital Campaign
Blank	no letter

2. Create these letters by copying your original WPTHANKS letter shown in the previous section. It is suggested that you name the files THANKS1, THANKS2, etc., or use another convention that has the number in the name of the file.
3. As you enter each gift in the gift entry screen, place the number of the letter at the prompt "Thank-you #". Place a 1 next to gifts that are to get letter #1, etc.
4. Create the Acknowledgement mailmerge file using the Batch Process described in the Reports chapter.
5. Now, when you run the mailmerge process, the primary and secondary file combinations will be the following:

Primary File	Secondary File
THANKS1	TY1.txt
THANKS2	TY2.txt
THANKS3	TY3.txt
and so on	

6. Of course, if you give your primary files some other name, you will have to substitute those names in the table above.
7. If you want to print envelopes or labels to all people who are to get thank you letters in that batch, use TY.DTA as the secondary file. This file holds all names of people from all the TY?.DTA files.

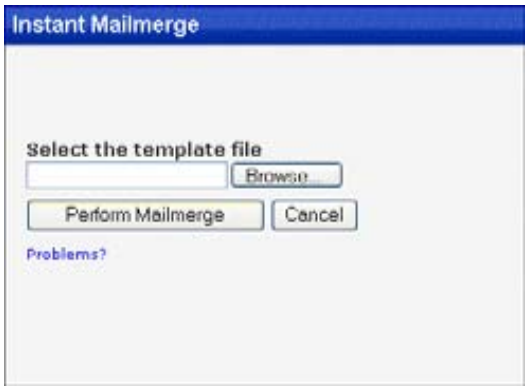
Instant Merge

DonorPerfect Online allows users to easily merge information from an individual donor, or a group of donors, to a previously saved template and perform an automatic mail merge within Microsoft Word. The end result can then be easily printed or emailed, making your communication efforts easier and more professional.

Using Instant Merge for One Donor

▶ To use Instant mail Merge for one donor

1. Click on the **Instant Merge** button from any Main screen. This will bring up the **Instant Merge Screen**, shown below:



2. You will need to select the template file that Microsoft Word will use as the basis for the letter. DonorPerfect Online comes with many templates, including labels, general letters, and thank you letters. See "Mailmerge Templates" page 155. Click on the **Browse…** button to select the template that you would like to use.

Note: If you have not done so already, you will need to download the templates you want.

3. Once the template is selected, click on **Perform Mailmerge**. Microsoft Word will automatically open and merge your letter. On the next page there is an example of the **General Mailmerge Letter** merged for one record.

Honest Politics Foundation
10147 W. Grantosa Drive
Washington, DC 20178

June 1, 2005

Mr. & Mrs. Harvey Smith
4710 South St
Hamilton, SD 92533

Dear Harvey and Mary,

There is a tragedy in America. Millions of your dollars are being wasted on pork barrel politics and we need your help. Monetary contributions can help us finally put an end to this ongoing problem. There are many much better uses for this wasted money, which could be used to help benefit all of society. If our goal of reducing the wasteful spending can come to fruition, the whole country would be the beneficiary.

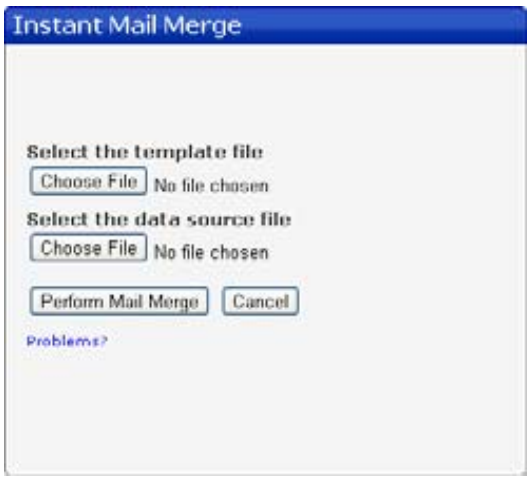
Help us stop the waste! Please give generously to the Honest Politics Foundation. With your support, we can make our political system a better place to politic!

4. Once in word, you can easily edit the letter, print it, or even email it from within Microsoft Word.

Using Instant Merge for Groups of Donors

▶ To use Instant Merge for Group Donors

1. Access the Mailmerge screen of DonorPerfect to download the group of donors by selecting **Mailings, Mailmerge**.
2. Once you have selected your options (for example, a Selection Filter…), click **Do** to download the file.
3. Save the downloaded file to a location you will remember, and click on **Instant Merge**.



4. Select the template file by clicking on the **Choose File** button under **Select the template file**. This template file can be the same one you downloaded in the previous steps above.
5. Select the data source file you just downloaded by clicking on the **Choose File** button under **Select the data source file**.
6. Click on the **Perform Mail Merge** button and Microsoft Word will automatically open and merge your letter.

Frequently Asked Questions

▶ Why do I have to use Internet Explorer to use this feature?

We use a technology called "Active X" to enable this integration. Active X is only available through Internet Explorer and allows your trusted Web sites (such as DonorPerfect Online) to control your computer and automate routine tasks (such as mail merging). Only Internet Explorer allows this type of automation with Microsoft Word.

▶ When I click on Perform Mailmerge, nothing happens. What do I do?

It is likely that your security settings are set too high for this feature to run correctly. To correct this problem, you will need to change the security settings for Internet Explorer (steps may vary slightly for different versions of Internet Explorer).

▶ To lower your settings, follow these directions

1. From the **Tools** menu in Internet Explorer 5+ or the **View** menu in Internet Explorer 4.0, select **Internet Options**.
2. Click the **Security** tab.
3. Select **Custom** and click **Settings**.
4. Under the Initialize and script ActiveX controls not marked as safe option, change the setting from Disable to Prompt.

▶ Can I use my own templates?

Absolutely! Since each template contains code that formats your data correctly, we recommend that you download one of our common templates, and then edit the text to customize the template. In addition, you can add graphics and/or your logo to the template, creating a truly unique, professional document to communicate with your donors.

Appendix D: Additional Customization Notes

Updating Your Zip Codes to Zip+4

The post office and many mailing houses can update all the zip codes in your database with Zip+4 codes. To do this, send them an ASCII file of your data. If your ASCII file doesn't fit on one floppy, you will have to make multiple ASCII files using a criterion that divides the file into pieces (such as ZIP Between "90" and "92"). If you are creating a fixed length file, make sure that you include at minimum the following fields: **Donor_ID, Last_name, First_name, Opt_line, Address, Address2, City, State, Zip.** If you are making a comma-delimited file, all these fields are automatically included. Make sure that the post office/mailing house returns back an ASCII file that includes at the least the donor # and new zip code.

Updated address information can easily be read back into DPO using the import module. See "DPO Import Module" on page 423.

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Appendix E: Field Descriptions and File Names

Main/Bio Screen Fields

File Name: Main/Bio -- main demographic information

*Optional Fields

**Optional Fields Needed for the EFT Module. (Purchased separately.)

Field	Field Type	Field Description
donor_type	Character	Type of Donor
flag	Character	Special Characteristics (BD,VOL,STF, etc.)
nomail	Logical	Do not Mail
nomail_reason	Character	Reason for Do Not Mail*
narrative	Memo	Narrative
last_contact_date	Date	Last Contact Date (calculated)
tag_date	Date	Tag Date (used for 2-pass selections)
initial_gift_date	Date	Initial Gift Date (calculated)
last_contrib_date	Date	Last Contrib. Date (calculated)
last_contrib_amt	Numeric	Last Contrib. Amount (calculated)
ytd	Numeric	This Year-to-date Total (calculated)
ly_ytd	Numeric	Last Year-to-date Total (calculated)
ly2_ytd	Numeric	Two Years Ago Year-to-date (calculated)
ly3_ytd	Numeric	Three Years Ago Year-to-date
ly4_ytd	Numeric	Four Years Ago Year-to-date
ly5_ytd	Numeric	Five Years Ago Year-to-date
ly6_ytd	Numeric	Six Years Ago Year-to-date
cytd	Numeric	This Calendar Year-to-date Total (calculated)
ly_cytd	Numeric	Last Calendar Year-to-date Total (calculated)
ly2_cytd	Numeric	Two Calendar Years Ago Year-to-date (calculated)
ly3_cytd	Numeric	Three Calendar Years Ago Year-to date

Field	Field Type	Field Description
ly4_cytd	Numeric	Four Calendar Years Ago Year-to-date
ly5_cytd	Numeric	Five Calendar Years Ago Year-to-date
ly6_cytd	Numeric	Six Calendar Years Ago Year-to-date
AUTOCALC1, 2, 3	Numeric	Auto-calculated Fields (based on gift info)*
gift_total	Numeric	Total Contribution Amount (calculated)
gifts	Numeric	Total Number of Gifts (calculated)
max_date	Date	Date of Largest Gift
max_amt	Numeric	Largest Gift
avg_amt	Numeric	Average Amount *
yrs_donated	Numeric	Number of years donated *
created_by	Character	User ID of creator
created_date	Date	Date created
modified_by	Character	User ID of modifier
modified_date	Date	Date of modification
donor_ID	Character	Record Number
first_name	Character	First Name
last_name	Character	Last Name
middle_name	Character	Middle Initial (optional)
suffix	Character	Suffix
title	Character	Mr./Ms/etc.
salutation	Character	Salutation
prof_title	Character	Prof. Title
opt_line	Character	Optional Line/Contact Person
address	Character	Address
address2	Character	Second Address
city	Character	City
state	Character	State
zip	Character	Zip
country	Character	Country (optional)

Field	Field Type	Field Description
address_type	Character	Address type
home_phone	Character	Home phone
business_phone	Character	Business phone
fax_phone	Character	Fax number
mobile_phone	Character	Cell phone
email	Character	Email address
initial_gift_date	Date	Date of first gift
org_rec	Character	Organizational record
mcat	Character	Standard membership level field
mcat_expire_date	Date	Standard membership expiration date*
mcat_enroll_date	Date	Standard membership enrollment date*
mcat_updown	Character	Standard membership, prior year's level*

Gift/Pledge Screen Fields

File Name: **GIFT/PLEDGE** -- all gift and pledge histories

Field	Field Type	Field Description
gift_id	Numeric	Unique gift record ID number
donor_id	Character	Record number from dp.dbf (auto-fill)
record_type	Character	Gift, Pledge, Soft Credit, Notification
gift_date	Date	Date of gift
amount	Numeric	Amount of gift
gl_code	Character	General ledger code
solicit_code	Character	Solicitation method code
sub_solicit_code	Character	Sub-solicitation code
campaign	Character	Campaign (auto-assigned based on GL or SOL)
gift_type	Character	Type of Gift
split_gift	Logical	Is this a split gift?
pledge_payment	Logical	Pledge?
reference	Character	Reference

Field	Field Type	Field Description
gfname	Character	Memorial/Honorarium/Guest first name
glname	Character	Memorial/Honorarium/Guest last name
fmv	Numeric	Fair Market Value
batch_no	Numeric	Batch Number (calculated)
gift_narrative	Memo	Gift Narrative
ty_letter_no	Character	Acknowledgement letter #
glink	Numeric	Code of gift linked to this gift (used to link split gifts, soft credits, notification gifts, and gifts to pledges)
nocalc	Logical	If true, gift is not used for calculated fields (optional)
ty_date	Date	Auto-filled when acknowledgement file is created (optional)
start_date	Date	Date Pledge Starts
total	Numeric	Total Amount Pledged
bill	Numeric	Total Amount to Bill
balance	Numeric	Total Balance Due (calculated)
delinquent	Numeric	Total Delinquent Amount (calculated)
initial_payment	Numeric	Initial Payment
frequency	Character	Monthly, Quarterly, Annual, ?
reminder	Logical	Send Reminder?
last_bill_date	Date	Last Date Billed (calculated)
last_paid_date	Date	Last Date Paid (calculated)
writeoff_amount	Numeric	Writeoff Amount
writeoff_date	Date	Writeoff Date (calculated)
created_by	Character	User ID of creator
created_date	Date	Date created
modified_by	Character	User ID of the modifier
modified_date	Date	Date of modification
plink	Character	Code of pledge linked to this pledge (used to link pledges, gifts, to pledges)
memory_honor	Character	Memorial or honorarium code

Field	Field Type	Field Description
receipt	Character	Receipt for gift
first_gift	Date	Date of first gift
batch	Character	Batch processing module batch number*
premium	Character	Batch processing module premium or gift field*
EFT	Character	EFT processing field**
account	Character	EFT credit card number processing field**
cc_exp	Character	EFT credit card expiration field**
bank	Character	EFT bank account number processing field**
bank_type	Character	EFT bank account type field**

Other Info. Screen Fields

File Name: **OTHER INFO SCREEN** -- Other Info File Structure

Field	Field Type	Field Description
other_id	Numeric	Unique other info ID number
donor_id	Character	Record number from dp.dbf (auto-fill)
other_date	Date	Other Date
comments	Memo	Comments
created_by	Character	User ID of creator
created_date	Date	Date created
modified_by	Character	User ID of modifier
modified_date	Date	Date of modification

(These fields are required. All other fields added are optional.)

Contacts Screen Fields

File Name: **CONTACT** -- Contact File Structure

Field	Field Type	Field Description
contact_id	Numeric	Unique contact ID number
donor_id	Character	Record number from dp.dbf (auto-fill)
contact_date	Date	Date of contact

Field	Field Type	Field Description
due_date	Date	Due date of contact item
completed_date	Date	Date item was completed
comment	Character	Comment
by_whom	Character	Contact person's initials
activity_code	Character	Contact activity code
mailing_code	Character	Mailing (Automatic)
document_path	Character	Location of file
created_by	Character	User ID of creator
created_date	Date	Date created
modified_by	Character	User ID of modifier
modified_date	Date	Date modified

Addresses Screen Fields

File Name: **ADDRESSES** -- Addresses File Structure

Field	Field Type	Field Description
address_id	Numeric	Unique address ID number
donor_id	Character	Record number from dp.dbf (auto-fill)
address	Character	Address
address2	Character	Secondary Address
city	Character	City
state	Character	State
zip	Character	Zip Code
country	Character	Country
address_type	Character	Type of address
getmail	Logical	Checkbox for receiving mail
opt_line	Character	Optional line
created_by	Character	User ID of creator
created_date	Date	Date created
modified_by	Character	User ID of modifier

Field	Field Type	Field Description
modified_date	Date	Date of modification

Link Screen Fields

File Name: **LINK SCREEN** -- Link File Structure

Field	Field Type	Field Description
link_id	Numeric	Unique link ID number
donor_id	Character	Record number (auto-fill)
donor_id2	Character	Second record number (auto-fill)
link_code	Character	Link code
created_by	Character	User ID of creator
created_date	Date	Date created
modified_by	Character	User ID of modifier
modified_date	Date	Date of modification

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Appendix F: Running DonorPerfect in Your Browser

PC

DonorPerfect Online has been designed to run in almost all browsers. However, if you are experiencing difficulty with your browser, we recommend using Microsoft Internet Explorer 6.0 or higher. You can download the latest version of Internet Explorer from www.microsoft.com.

Macintosh

DonorPerfect Online also runs on the Macintosh OS X platform. For Macs, DPO supports the Safari 1.0 browser environment. To learn more about Safari, go to www.apple.com.

Both Platforms

When using Internet Explorer, you want to make sure that you are NOT using a Proxy Server.

A Proxy Server allows large networks to more efficiently access the Internet by storing graphics and files from web sites. This method works well when accessing most web sites. However, the method backfires on web sites such as DonorPerfect Online and other ASP's, because each time a page is accessed, the Proxy server must reload the page each time, decreasing system performance.

▶ To see if you are using a Proxy Server (PC):

1. Open **Internet Explorer**.
2. Click on **Tools**, **Internet Options**.
3. Click on the **Connections** tab.
4. Click on the **LAN Settings** button.

At the bottom of this screen, there will be a "Use a Proxy Server" check box that may be checked

If this box is checked, then your browser is using a Proxy Server. Please contact your IT department to specify https://www.donorperfect.net as an exception to the Proxy Server. Making this change will significantly increase the speed of DPO.

▶ To see if you are using a Proxy Server (Mac):

1. Open **Safari**.
2. Click the **Safari** menu item at the top of the screen.
3. Click **Preferences**.

4. Click **Advanced**.
5. Where the screen says **Proxies,** click **Change Settings.**

If you have a proxy set up, the **Select a proxy server to configure** menu box will have checked boxes inside, with options regarding your proxy server. Please contact your IT department to specify https://www.donorperfect.net as an exception to the Proxy Server. Making this change will significantly increase the speed of DPO.

Appendix G: Membership Organization Support

Introduction

Organizations which award memberships of varying levels in return for donations can use the membership organization support features built into DonorPerfect Online to automate some of their work. Your DPO system can be set up to automatically confer varying levels of membership upon donors based on the level of giving, and can generate reports which outline the various membership levels currently awarded to donors.

Setup

The following steps outline the process needed to set up the membership organization support features:

1. Set up Entry Screen parameters.
2. Set up user defined fields.
3. Create Membership Type codes for each membership level.
4. Configure a general ledger code for membership.

Setting up Entry Screen Parameters

There are system parameters which need to be enabled to allow the Gift Entry Screen to automatically sort donors into membership categories.

▶ To set up the Entry Screen Parameters needed by the membership organization support features

1. In the navigation bar, select **Settings**, then **Parameters**.
2. Click the link for **Entry Screens**.
3. Make sure the following options are checked:
   - Auto-calc Membership Category
   - Auto-calc Membership Expire Date
4. Click the **Save** button.

Setting Up User Defined Fields for Membership Support

There are five user defined fields which need to be set up in order for the membership support features to function.

▶ To set up the user defined fields needed by the membership organization support features

1. In the navigation bar, select **Settings**, then **Screen Designer**.
2. Set **Show Only** to **Main**.
3. Click the **Go** button.
4. Add the following fields:

Name	MCAT	MCAT_UPDOWN	COMP	MCAT_EXPIRE_DATE	MCAT_ENROLL_DATE
Table/Screen	Main	Main	Main	Main	Main
Section Title	Membership Information				
QuickLink?	No	No	No	No	No
QuickLink Caption					
Display Type	Dropdown (single selection)	Dropdown (single selection)	Textbox	Textbox	Textbox
Prompt	Membership Type	Up/Down From	Complimentary?	Expiration Date	Enroll Date
Display?	Yes	Yes	Yes	Yes	Yes
Position	2200	2300	2400	2500	2600
Data Type	n/a	n/a	Character	Date	Date
Textbox Length	n/a	n/a	3	10	10

See "Screen Designer" page 393 for details on user defined fields.

Creating Membership Type Codes

In order for the system to sort donors by membership type, you must first set up Membership Type codes for each membership level.

▶ To set up codes for each membership level

1. In the navigation bar, click on **Settings**, then **Code Maint.**
2. Set **Show Only** to **Membership Type/Donor Screen**.
3. For each membership level code:
   a. Click the **Add** button.
   b. Set **Field Name** to **Membership Type**.
   c. Enter the membership code in the **Code** field.
   d. Enter a shortened description of the code in the **Description** field (one word if possible).
   e. Enter the minimum donation for the membership level in the **Low $** field. For instance, if the "Slugger" level membership covers donations of 0 to 200 dollars, you would enter **0.00** in the **Low $** field.
   f. Enter the maximum donation for the membership level in the **Hi $** field. If the "All-Star" membership level covers donations of $5,000 to $10,000, you would enter **$10,000.00** in the **Hi $** field.
   g. Click the **Save** button.

Configuring a GL_CODE for Memberships

In order to log gifts that confer memberships, you need to set up a GL code for memberships.

▶ To set up a GL Code for memberships

1. In the navigation bar, click on **Settings**, then **Code Maint.**
2. Set **Show Only** to **GL Code/Gift Screen**.
3. Click **Add**.
4. Set **Field Name** to **Membership Type**.
5. Enter the new GL code for memberships in the **Code** field.
6. Enter a shortened description of the code in the **Description** field (ex: **Membership**).
7. Check the **Update Membership** box, and select **MCAT** in the list next to it.
8. Click the **Save** button

Entering Gifts for Members

When entering gifts that count towards the membership level of a donor, make sure to set **General Ledger** to the membership GL code set up previously.

Tracking Membership Levels

User the Membership Reports to track the membership levels conferred to donors. You can list all members by category, view the actual payment levels within each category, and track users whose memberships have been upgraded, downgraded, or allowed to lapse.

See "Membership Reports" on page 249 for details.

Appendix H: Illegal Import Options for Import 2.0

The following notes on which import options are legal for each import type are intended to be used as reference when creating your import data files.

There are different import options for each type of import that you can select in the File Upload screen of Import 2.0.

Insert New and Update Existing Records

If you plan to use the **Insert New and Update Existing Records** import type, the following rules apply:

- You must set **Select Type of Records** to one of the options in the list. You cannot leave it blank or set to **Select Table**.
- All records must include name and address information. If you want to import transactions such as pledges or gifts without creating constituent records, you must use the **Insert Only** or **Update Only** import types instead.

Insert Only

If you plan to use the **Insert Only** import type, you cannot use Record Matching, and Constituent Matching is automatically set to **Donor ID**.

Update Only

If you plan to use the **Update Only** import type, you must provide the Donor ID (or Gift ID, etc), as all record matching is done using Constituent Matching to the primary ID for that record type.

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