Getting Started Guide

DonorPerfect Online

SofterWare, Inc.
DonorPerfect Online
January 2012

Table of Contents

Introduction

DonorPerfect Online is designed for those individuals that are not IT professionals. It is for the average user that has some database experience, but may need a little help from time to time.

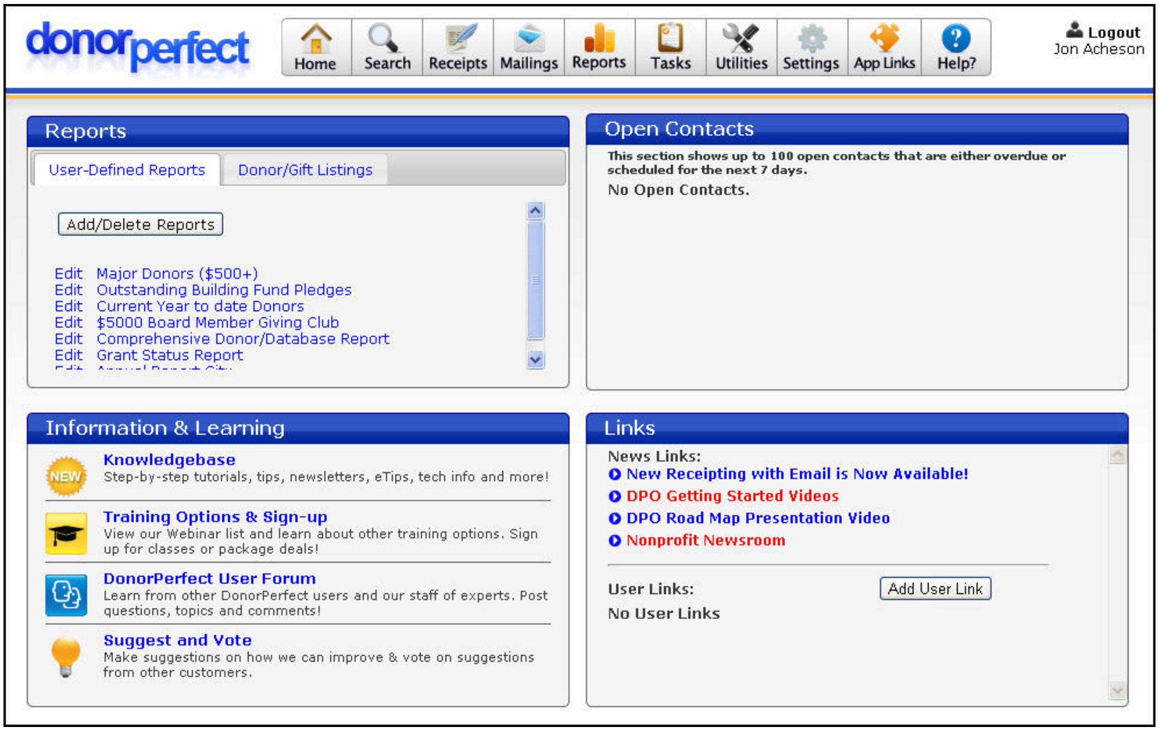
Since this is a step by step tutorial, you will get the most out of it by sitting at your computer and following along as we perform various tasks together. Remember that most screens in DPO are customizable to individual needs, and therefore may not match exactly what you have on the screen.

You are going to learn how to:

- Set up and Maintain Codes
- Enter New Individuals and Organizations
- Enter Gifts and Pledges
- Pay Pledges
- Keep Track of Biographical Information
- Manage Contacts
- Manage Grants
- Create Reports
- Run Detailed Analyses
- Plus Many Other Functions!

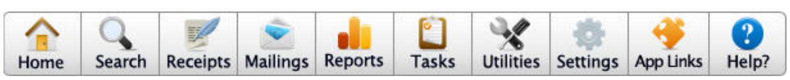
When the time comes for a step by step set of instructions, all of the steps will be listed together, with figures listed afterwards. This gives some continuity to the steps, and makes the writing flow more easily. Just look to the pages following the instructions to find the relevant figures and screen shots.

Introduction to DonorPerfect Online



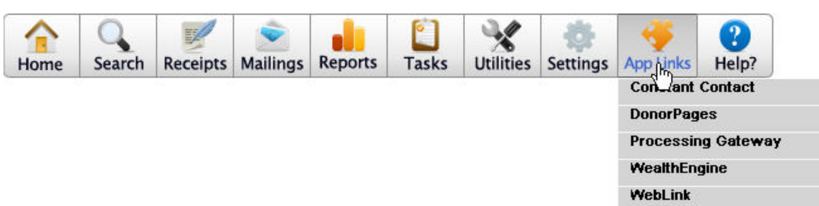
This section teaches how to find your way around DonorPerfect Online

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 navigation bar buttons are:

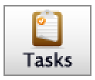
Clicking this button takes you back to the home page of DonorPerfect Online, which is called the Personal Dashboard.

Clicking this button 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.

Clicking this button displays the Receipts and Acknowledgments screen, which allows you to generate verification listings and mail merge data files for donations.

Selecting this menu displays links to screens that are used to produce mailings and communicate with donors.

Selecting this menu displays links to various categories of reports that you can use to analyze the donor information in your system.



Selecting this menu displays links to a number of basic tasks such as batch entry, EFT, Moves Management and generating pledge reminders.

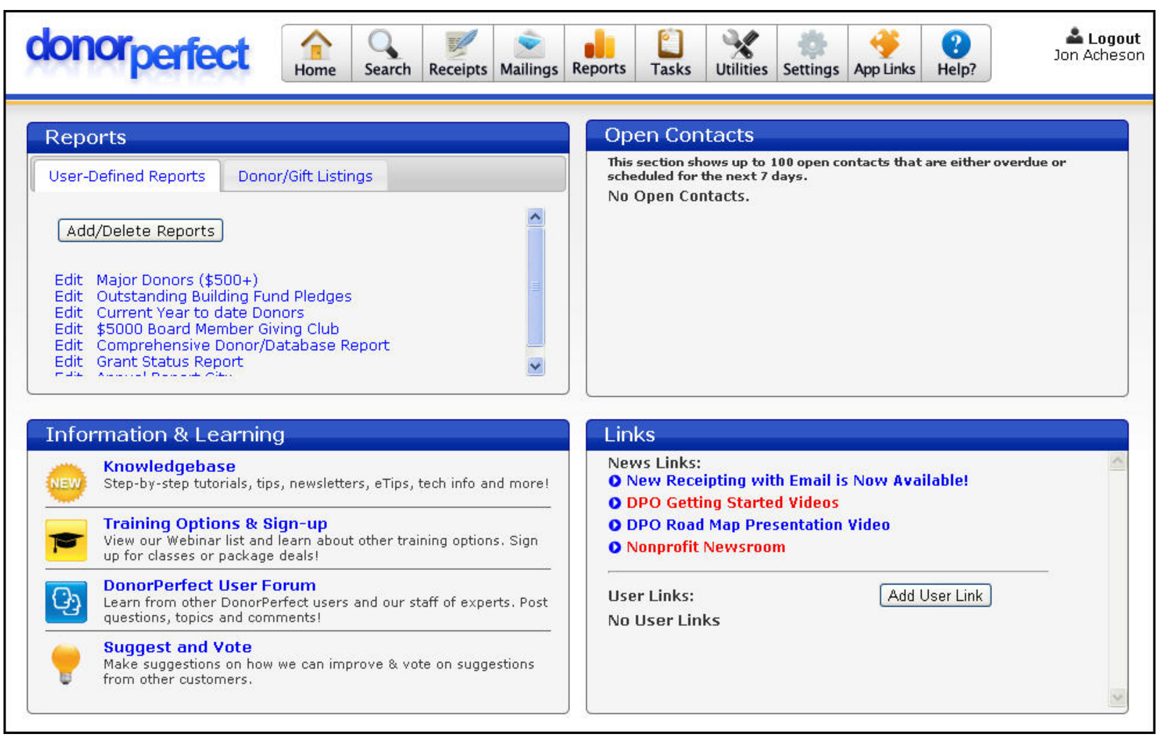
Selecting this menu displays links to a number of utility screens that allow you to perform various useful functions and customize DonorPerfect to your needs.

Selecting this menu displays links to screens that allow you to configure settings for the application and its features.

Selecting this menu displays links that allow you to connect to other online applications such as Constant Contact, DonorPages, WealthEngine and WebLink.

Selecting this menu displays links to the online help system, as well as other sources of information and assistance.

Personal Dashboard

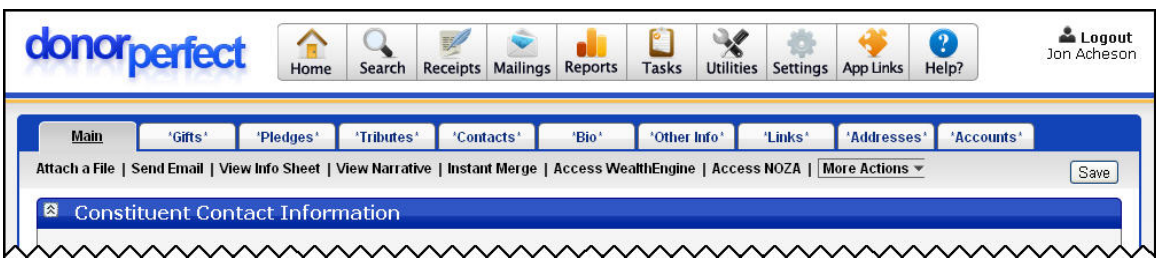


The Personal Dashboard is a customizable screen that provides quick access to your commonly used reports, open contacts, and web pages. It is the first screen that appears once you log into DonorPerfect Online, and you can return to it at any time by clicking on the **Home** button in the navigation bar.

The Personal Dashboard contains the following sections:

- **Reports:** this section contains two tabs: one that displays user-defined reports that have been set up for your system, and one that allows you to generate lists of donors and gifts.
- **Information & Learning:** this section links to other sources of information about DonorPerfect Online, such as training classes and our user forum.
- **Open Contacts:** this section displays contacts which are open or overdue.
- **Links:** contains a list of news links that are provided by SofterWare, Inc. as well as a set of User Links that you can define.

Entry Screen Tabs and Action Tool Bar



The Main Entry Screen has been reorganized so that each of the screens is listed with a tab that appears at the top of the screen, under the navigation bar. Clicking on the tab for a screen takes you to that screen. For instance, you can click on the **Gifts** tab to go to the Gifts List screen.

In addition, all of the various actions that you can take from a data entry screen are now listed in a line of links just underneath the tabs at the top of the screen, instead of being scattered throughout the screen. This line of action links is called the *Action Tool Bar*.

"Donors" vs. "Constituents"

We now use two different terms to refer to individual records: *donors* and *constituents*. "Constituent" refers to any person who has a record in the system; they may be a donor, a volunteer, an acquaintance, or a prospective donor. "Donor" refers to persons who have actually made a pledge or donation.

App Links

The App Links section of the navigation bar allows you to access other related online applications such as WebLink, DonorPages and Constant Contact.

Help Menu

The Help menu contains a number of features that allow you to get help and support:

- Select **Online Help** to access the online help for DonorPerfect Online. The help is extensive, and contains all the information in the printed manual, and more.
- The **Downloads** link displays various documents, icons, and files that are available for download, such as a DPO desktop icon.
- Select **Knowledgebase** to access a wide selection of support documents and training videos from the SofterWare Knowledgebase.
- The **Suggestions** link displays the UserVoice website which allows users to submit new ideas and vote on ideas that they support.
- The **Support** link displays 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.
- The **Training** link opens up the Training area of the DonorPerfect website. This area contains complete and up-to-date information about the training classes and webinars offered by our staff.
- The **User Forum** link connects to the User Forum that is found in the Client Area of the DonorPerfect website. This is an online discussion area where you can discuss problems, issues and suggestions with the staff of SofterWare, Inc.

Setting Up Codes

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

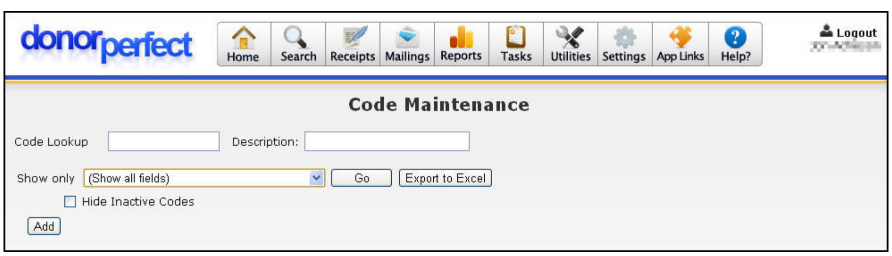
- *Flags* define the relationship of a constituent with their organization (Volunteer, Staff, Board Member, etc.)
- *Donor Type* codes define the kind of donor that a constituent record represents (Individual, Organization, etc.)
- *Solicitation Codes* (SOL) identify which solicitation was responsible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

It is very important that you keep a good handle on your organization's codes. They are the key to being able to analyze your performance at a later date. For instance, you cannot track how many responses you got from a mailing if your data entry person didn't know to select a solicitation code while entering contact data.

Another potential pitfall is allowing every volunteer you can muster to enter codes. For example while FAPARE97 may make sense to them, it will surely be difficult to decipher later. Establish a system for naming and describing codes, and enforce that system. It will make your life easier when it comes time to clean up old codes later.

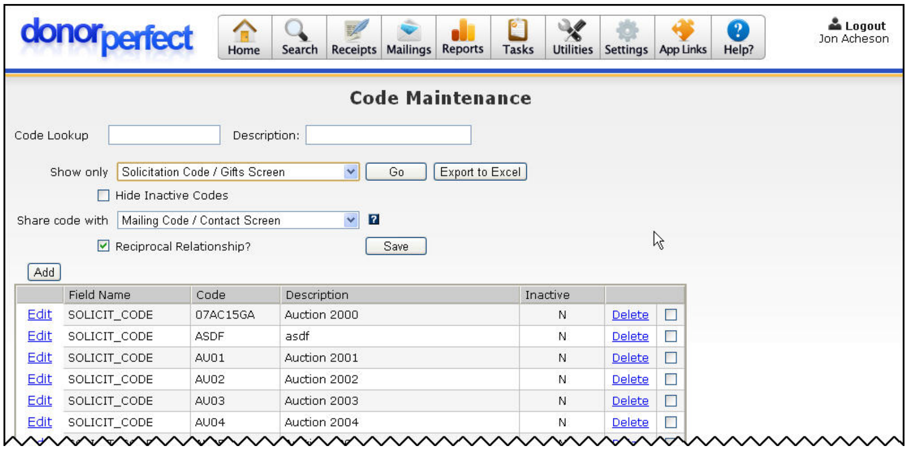
Step by Step

1. Click **Settings**, then **Code Maintenance**.



   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.

2. Set **Show only** to the type of code you want to display, such as **Solicitation Code/Gifts Screen**.
3. Click the **Go** button.
4. All of the codes in the selected category will be listed:



5. **Add**, **Edit** or **Delete** as necessary.

Pointers

☑ Any code may be edited, but only unassigned codes can be deleted, since to delete them would leave orphan records.

☑ When a code that is assigned is edited, the affected records automatically update to the new code.

☑ If you simply must delete a code that is assigned instead of editing it, run a selection filter of all records with that code, and change them manually.

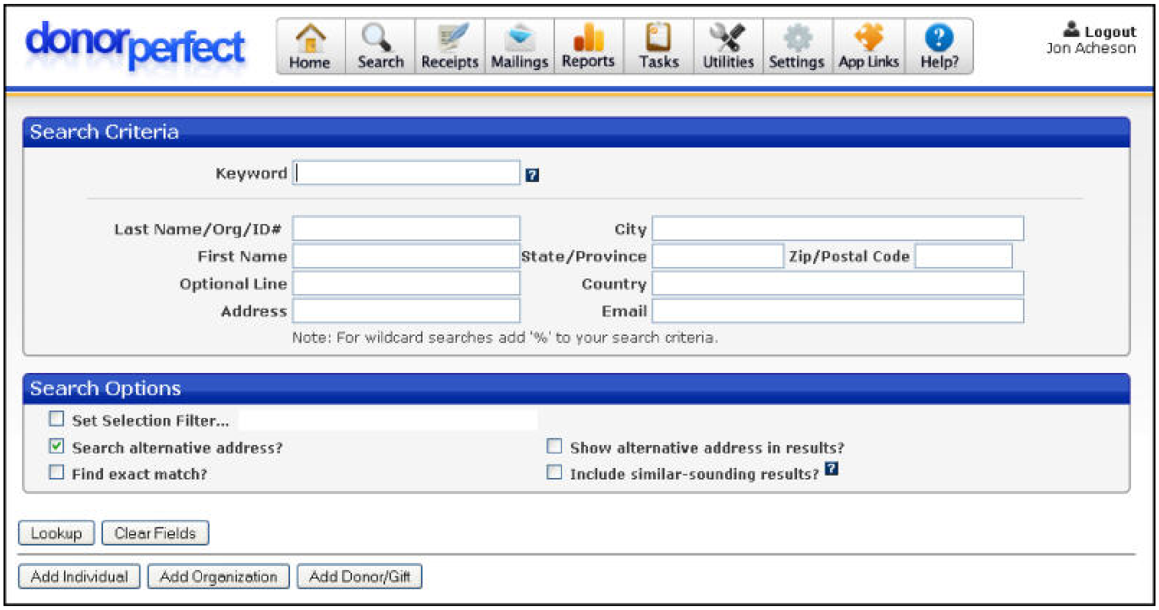
☑ For details on Code Maintenance, see Using the Code Maintenance Screen in the SofterWare Knowledgebase.

☑ For tips on creating a set of codes that are easy to maintain, see Tips for Creating a Good Coding System in DonorPerfect Online in the SofterWare Knowledgebase.

Entry Screens

Searching for a Donor

The Search screen allows you to look up records in your database, as well as enter new data. To access the Search screen, click the **Search** button on the navigation bar.



You should always search for a constituent before creating a new record. Otherwise, the record you create may be a duplicate of a record that is already in the system, leading to confusion and other problems.

The Search screen is designed to be powerful, yet easy to use. It allows you to search for records using a number of different methods:

- Search by Donor ID number
- Search by keyword
- Search by last name
- Search by organization name

Searching by Donor ID Number

The Donor ID is a unique number assigned to each donor record. If you remember the Donor ID number of the constituent, you can use it to access their constituent record in one simple step.

► To search for a constituent using their Donor ID number

1. Type the Donor ID into the **Last Name/Org/ID#** field.
2. Hit the **ENTER** key on your keyboard.

This will open their record in the Main Entry Screen without having to select the donor from a list.

Searching by Keyword

Any search terms entered into the **Keyword** field will be compared against the beginning of the **First Name**, **Last Name**, **Middle Name** and **Optional Line** fields to find matching constituent records.

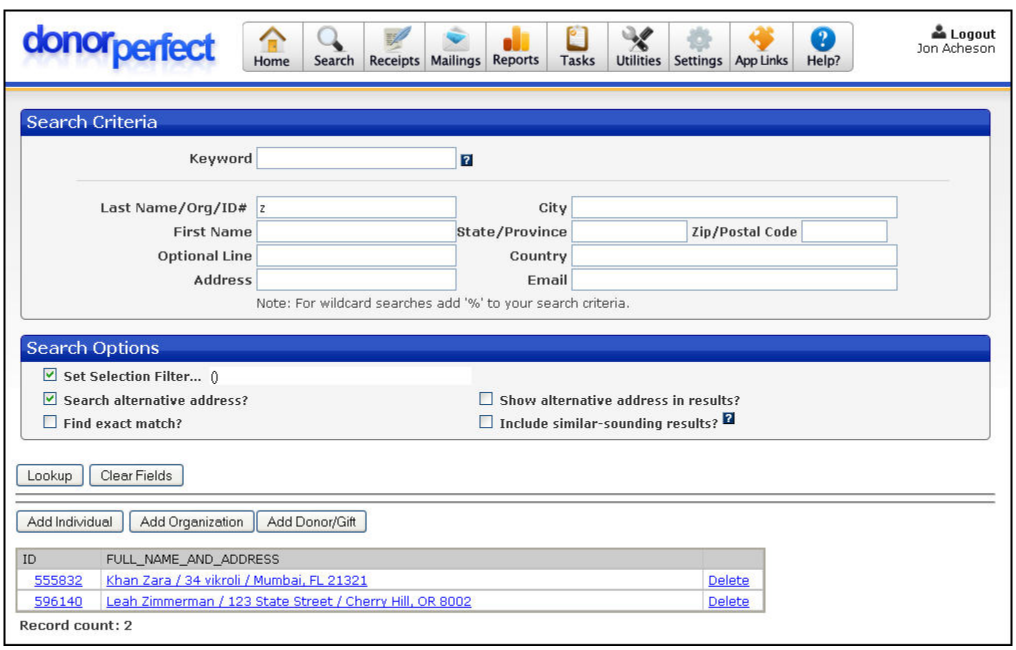
If a search term is entered into one of the other **Search Criteria** fields, that term will be used to search that field instead of the term from the **Keyword** field. For instance, if you enter "Moe" into the **First Name** field, and "Howard" in the **Keyword** field, the Search function will search for constituent records with a **First Name** that begins with "Moe" and search for "Howard" at the start of the other fields.

Note: If you enter a Donor ID in the **Last Name/Org/ID#** field and hit the **ENTER** key, the contents of the **Keyword** field will be ignored.

Searching by Last Name

► **To search for a constituent using their last name**

1. Enter the first letter of the constituent's last name into the **Last Name/Org/ID#** field. For instance, to look for Dr. Leah Zimmerman, enter a **Z** into the field.
2. Click the **Lookup** button. The records that match the search criteria entered will display at the bottom of the screen:



3. Click on the record for **Dr. Leah Zimmerman** to open it in the Main Entry Screen.

Searching by Organization Name

Searching for an organization's constituent record using the name of the organization is nearly identical to searching for an individual by last name. Simply type the name of the organization into the **Last Name/Org/ID#** field and click the **Lookup** button. You can then select the organization from the list of matching records at the bottom of the screen.

Pointers

- ☑ It's usually not necessary to type in the entire last name of the constituent. You should be able to narrow the search down to one or two names just by searching on the first 3-4 characters of their last name.
- ☑ You can search on part of a name by using a percentage sign (%) as a wildcard character. The percentage sign can stand in for any number of characters in the search. For instance, searching for **%and** would match **Anderson**, **Sandstone**, **Smithland** or **Zackland**.
- ☑ Constituent records you have already edited this session will be listed at the bottom of the Search screen under **Recently Viewed Donor Records**.

Creating a New Constituent Record

If searching for a constituent turns up no matching records, you will want to create a new record for that constituent.

Enter Zimmerman into the **Last Name/Org/Id #** field, and click **Lookup.** Three buttons, **Add Individual**, **Add Organization,** and **Add Donor/Gift** will appear below, as well as any records that matched you search, or in this case, a message that says "no records found." Of course, if someone has already completed this tutorial, you may have one result, or if you have donors named Zimmerman, you may have more results.

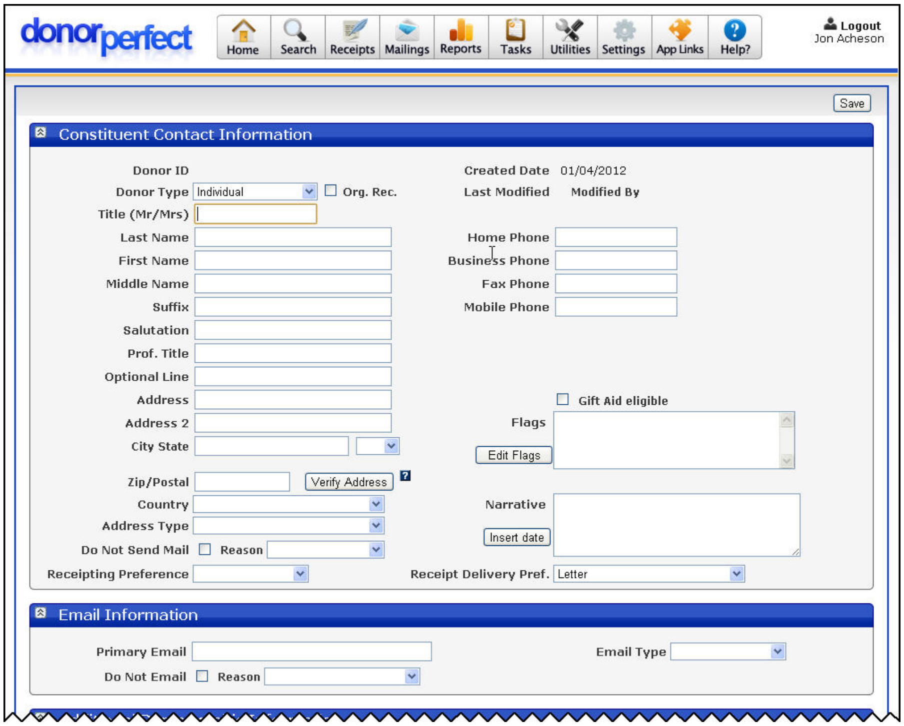
Step by Step

► To enter your first donor:

1. Search for the constituent using the steps in the previous section. If no matching record is found in the system, the words **No Records Found** will appear at the bottom of the screen.

   > Note: If a matching record is found, use that one. You should never create a duplicate of an existing record.

2. Just below the **Lookup** button, you will see three additional buttons: **Add Individual**, **Add Organization**, and **Add Donor/Gift**. Click the **Add Individual** button. The Main Entry Screen appears:



3. Fill in the fields with the information for your donor.
4. Click the **Save** button (either at the top or bottom of your screen).

Pointers

- ☑ Always remember to click **Save** after you have entered data or made a change to a record. If you simply close out the window, or use the **Back** button in your browser, no changes are made in the system.
- ☑ Grayed out fields indicates DonorPerfect is performing an automatic function. Data cannot be entered into these fields, nor can it be changed or deleted.
- ☑ To edit the record you just saved, just search for it using the Search Screen.
- ☑ Active DonorPerfect menus will be underlined, while those menus that contain information in a given record will be **bolded.**
- ☑ For full details on entering constituent records, see Using the Main Entry Screen in the SofterWare Knowledgebase, or watch the Adding a Constituent training video.

Entering a New Gift

Money! When you receive donations, you should make a record of them in your database. This will allow you to monitor the income for your organization, and also allow you to track the giving habits of your donors. Donations are entered on the **Gift** tab of the Main Entry Screen for the donor's constituent record.

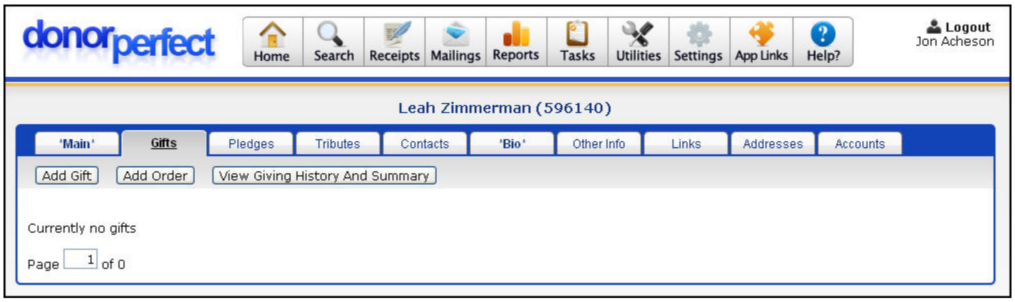
Say you get a check from a Dr. Leah Zimmerman, M.D. You might recognize the name, and realize she has made a donation to your organization before. To confirm your suspicions, go to the Search Screen and enter "Zimmerman" in the **Last Name/**

Organization/ID # field, and click **Lookup**. This time you should get a result. We will click on her name and add the new gift to her record.

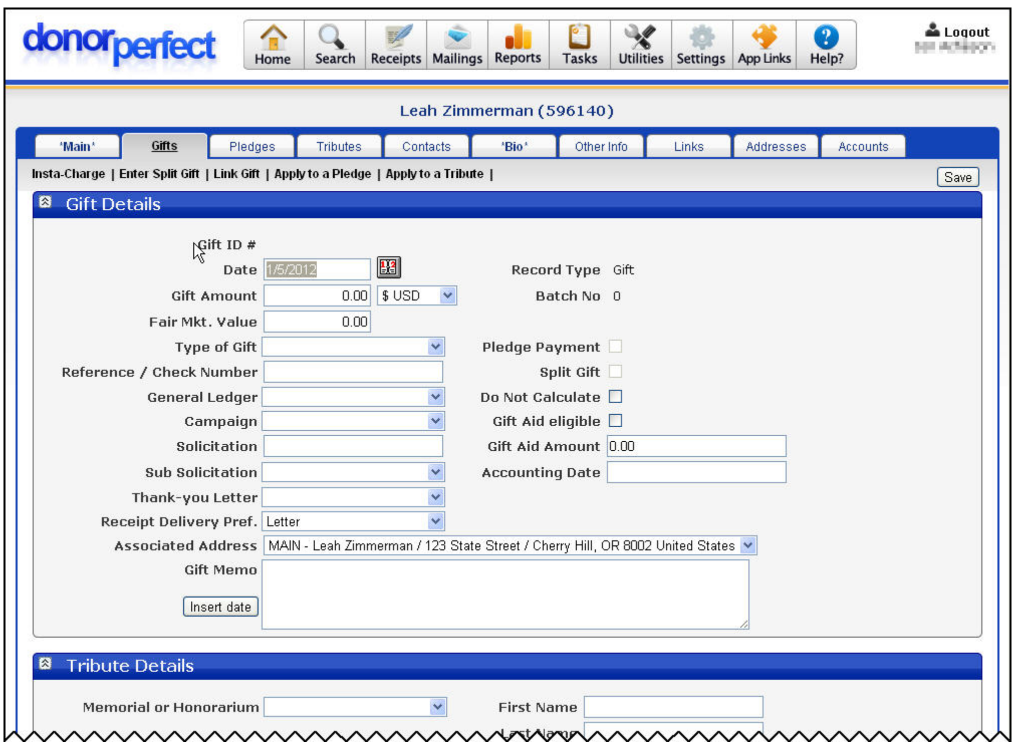
Step by Step

1. Open Leah Zimmerman's record in the Main Entry Screen (see "Searching for a Donor" on page 11 for details).

2. Click the **Gifts** tab. The Gift List screen will appear. Your screen will say **Currently No Gifts**:



3. Click the **Add Gift** button. The Gift Entry screen appears:



4. Enter the data as for the gift and click the **Save** button. The gift entry now appears in the Gift List screen.

Pointers

- ☑ **Always** be sure to fill in the **General Ledger** and **Solicitation fields.** General Ledger enables you to track where the gift is deposited, and the Solicitation field enables you to track your organization's marketing success.
- ☑ You may edit or delete from the list of gifts by clicking the **Edit** or **Delete** buttons to either side of each gift.
- ☑ Click the **View Giving History and Summary** button to view a compilation of that donor's giving history.
- ☑ For full details on entering a gift, see Adding a Gift in the SofterWare Knowledgebase, or view the Gifts and Pledges in DPO training video.

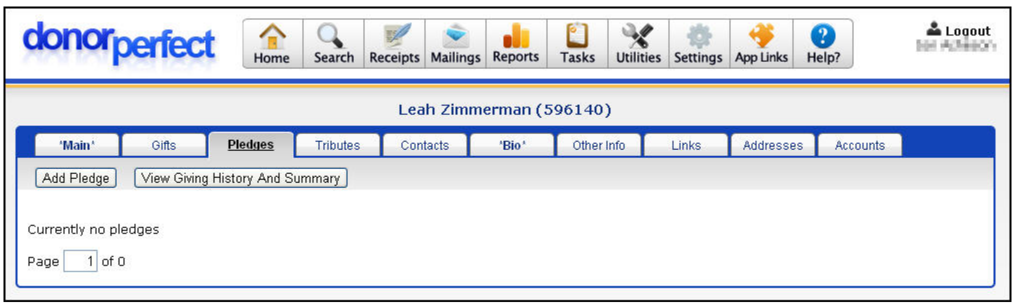
Entering a New Pledge

If you have mastered entering gifts, you are in luck because entering a pledge is almost the same process. Pledge records are entered in the **Pledges** tab of the Main Entry Screen.

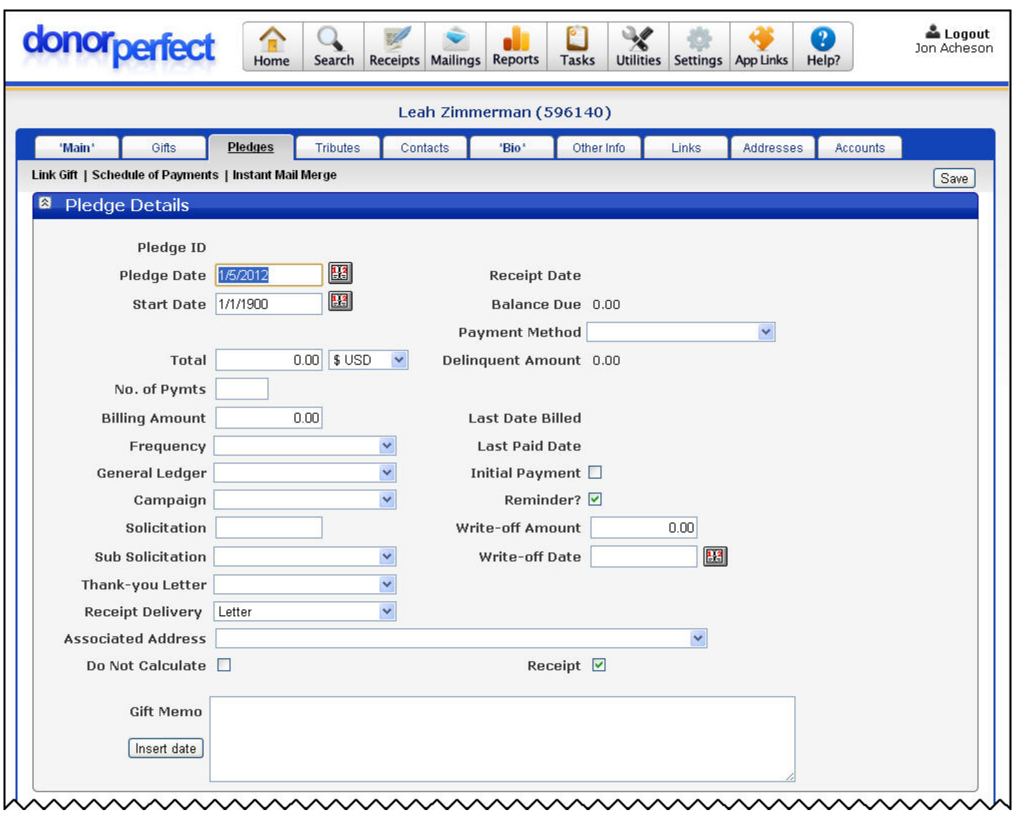
In our example, we will enter a pledge from Dr. Leah Zimmerman.

Step by Step

1. Open Leah Zimmerman's record in the Main Entry Screen (see "Searching for a Donor" page 11 for details).
2. Click the **Pledges** tab, and notice that there are "currently no pledges" in the system.



3. Click the **Add Pledge** button. The Pledge Entry Screen appears:



4. Enter the following information for the pledge:
   a. Set **Total** to **$1,000**.
   b. Set **No. of Payments** to **20**.
   c. Set **Frequency** to **Monthly**.
5. Click the **Save** button.

Pointers

☑ Just as with Gifts, you should always enter the General Ledger and Solicitation fields.

☑ Note the total pledge amount is $750, while the billing amount is $250. If the payments start on 1/1/2005, then the pledge will be paid in full on 4/1/2005.

☑ You can also click **View Giving History and Summary** in the Pledges menu.

☑ The **Schedule of Payments** link is only active when the frequency is set to **"Unusual."**

☑ For details on entering a pledge, see Adding a Pledge in the SofterWare Knowledgebase, or view the Gifts and Pledges in DPO training video.

Paying Off a Pledge

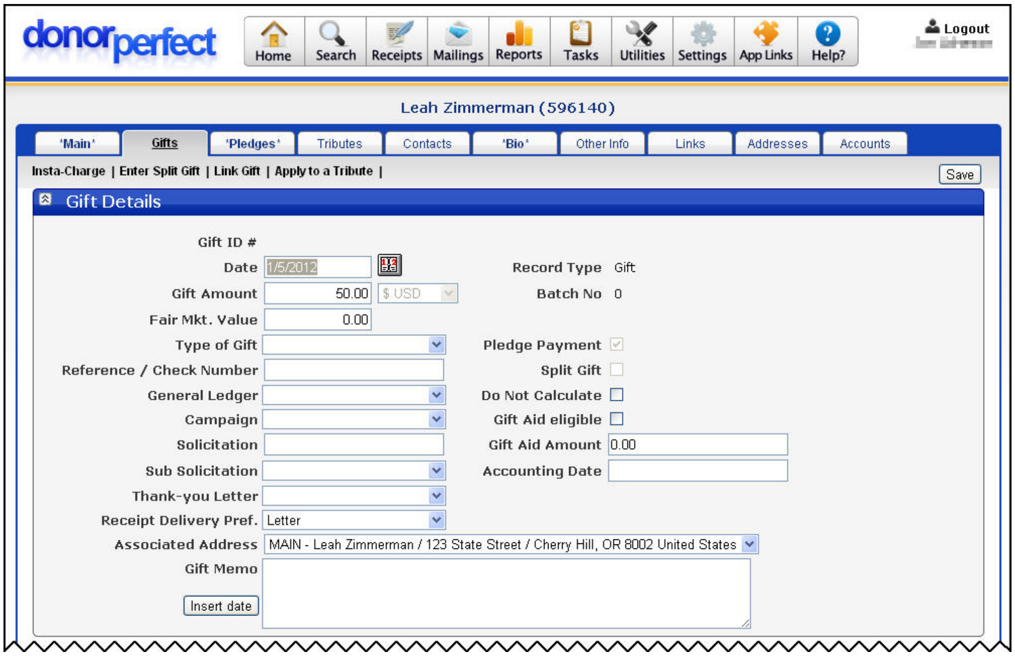
So a donor's first pledge payment comes in the mail, what do you do? Well, we need to apply it to the donor's outstanding balance. This creates a gift record for the pledge payment.

In this example, we will be applying a pledge payment to the pledge we entered for Dr. Leah Zimmerman in the previous section.

Step by Step

1. Open Leah Zimmerman's record in the Main Entry Screen (see "Searching for a Donor" page **Error! Bookmark not defined.** for details).
2. Click on the **Pledges** tab. The Pledges List screen appears:

3. Find the appropriate pledge, and click the **Apply Payment** link.



4. Fill in the data as shown above, and click the **Save** button.

The pledge payment will be applied to the pledge:

Pointers

- ☑ Note that the payment screen is really a gift entry screen, with the Gift Amount, Gift Date, General Ledger and Solicitation fields already filled in.
- ☑ When you save the payment, it is listed under the gifts menu.
- ☑ Note that in the final picture the pledge payment has been applied to the outstanding balance for the pledge.
- ☑ You can click **View Giving History and Summary** here as well.
- ☑ For details on applying a payment to a pledge, see Applying a Pledge Payment in the SofterWare Knowledgebase, or view the Gifts and Pledges in DPO training video.

Entering Contacts

Contact records allow you to track all of the meetings, phone calls, emails and other points of contact between your constituents and your organization.

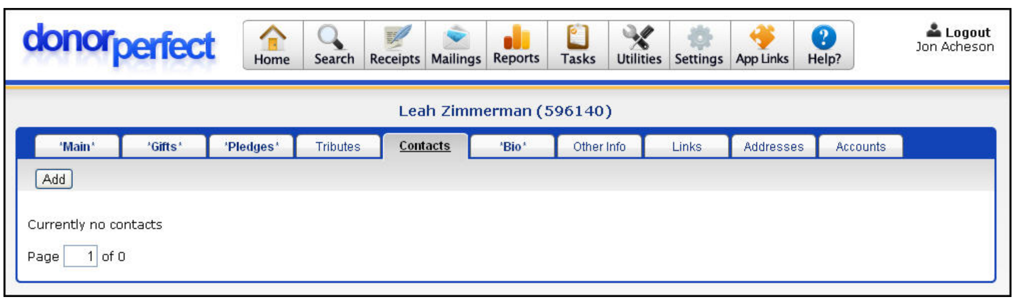
> Note: A *contact* in DonorPerfect Online refers to the meeting, phone call or email, not the person being contacted.

Besides keeping a historical list of every contact with a donor or organization, you can plan for future contacts by scheduling telephone calls, meetings, emails, and the like.

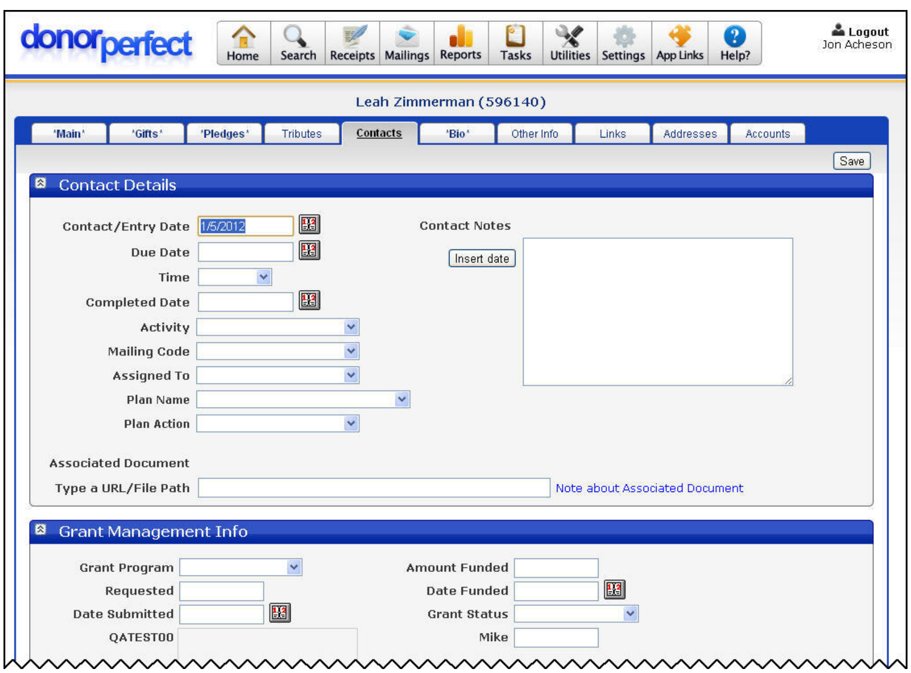
For this example, we will create a contact record for a meeting with Dr. Leah Zimmerman.

Step by Step

1. Open Leah Zimmerman's record in the Main Entry Screen (see "Searching for a Donor" page 11 for details).
2. Click the **Contacts** tab. The Contacts list will display "Currently no contacts."



3. Click the **Add** button. The Contact Entry screen appears:



4. Enter the following information for the contact:
    - Set **Due Date** to a week from today.
    - Set **Time** to **3:00 PM**.
    - Set **Activity** to **Meeting**.
5. Click the **Save** button.

Pointers

☑ The due date is used when you have scheduled a future contact.

☑ The completed date is the date that you actually spoke to the donor, or sent the email, etc.

☑ Keep track of what was said, and what you plan to say, in the **Contact Notes** field.

☑ For details on using the Contacts screen, see Using the Contacts List Screen in the SofterWare Knowledgebase.

☑ An additional feature of the **Contacts** screen is the **Grant Manager.** The **Grant Manager** simplifies your job by giving you the ability to enter each grant, its date of submission, status, date of next report, etc. See DPO Grant Management in the SofterWare Knowledgebase for more information.

☑ DPO also features **Outlook Integration**, which allows you to synchronize your DPO Contact list with your Microsoft Outlook calendar. See Using Microsoft Outlook Integration in the SofterWare Knowledgebase for more details.

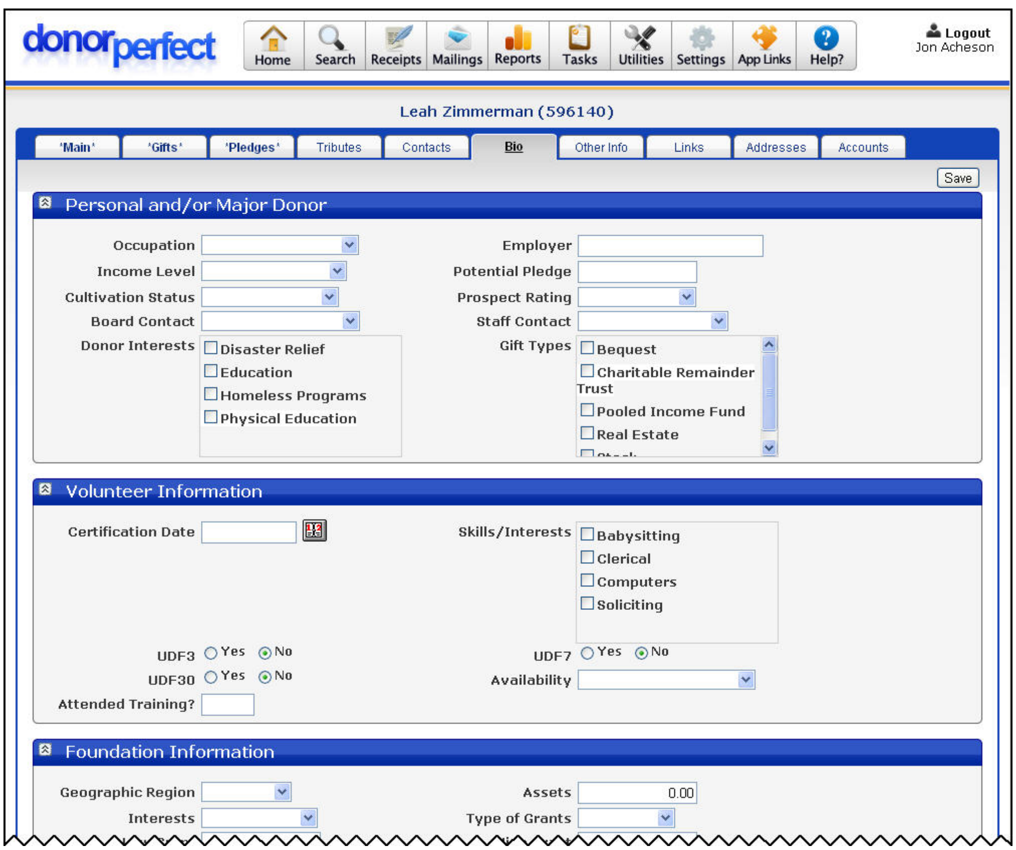
Entering Biographical Information

The Bio screen is used to record additional donor information needed by your organization. This info can then be used to run more exclusive filters on your donors (which we will discuss later). The screen is intended to be customized to your needs, so its contents are completely up to you. Some of the common types of information stored here include:

- Additional personal information such as income level or donor interests
- Volunteer information,
- Membership data
- Alumni status
- Political affiliations
- Occupational information
- WealthEngine data (requires the optional WealthEngine feature)

Step by Step

1. Open Leah Zimmerman's record in the Main Entry Screen (see "Searching for a Donor" page 11 for details).
2. Click the **Bio** tab. The Bio screen appears:



3. Enter the data in the various sections of the screen.
4. Click the **Save** button.

Pointers

☑ You can enter as little or as much Bio information as you feel necessary for each donor.

☑ The more information you enter, the more ways you can filter your data later.

☑ The graphics above were taken from a demo system, and will therefore not look exactly like your Bio Screen. This screen is fully customizable to your needs.

☑ For information on the Bio screen, see Using the Biography Screen in the SofterWare Knowledgebase.

☑ For details on customizing DonorPerfect Online screens, see Using the Screen Designer in the Softerware Knowledgebase.

Processing Donation Receipts

"Thank you to everyone who has supported us! Your donations make our work possible!"

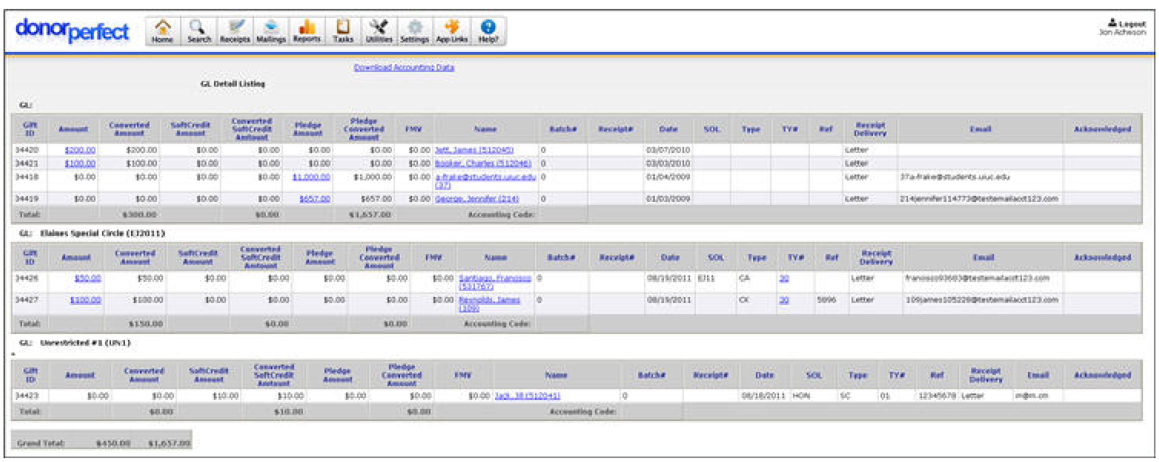
Once you have entered gifts and pledge payments into your DonorPerfect Online system, you will want to generate thank-you letters and receipts to send to your donors.

The receipting process works as follows:

1. Enable receipting through various Parameter settings.
2. Set the receipting preferences for each donor (letter receipt, email receipt, none or both). You can also select the receipting type at the gift level, which overrides the donor-level settings.
3. DonorPerfect Online keeps a list of all gifts that have been added to the system since the last time that receipts were processed. We call this the *current batch*.
4. When you process receipts, letter receipts and email receipts are generated for each unprocessed gift in the current batch as specified by the receipting preferences at the donor and gift levels.
5. Once all receipts have been processed, the gifts in the current batch are marked as having been processed. As new gifts are entered, they will be added to a new batch, and the cycle repeats.

Viewing Unprocessed Transactions (GL Detail Listing)

Before you get started generating receipts and acknowledgements, it can be handy to view the unprocessed gifts and pledge payments that are currently in your system.



GL:

Gift ID	Amount	Converted Amount	SoftCredit Amount	Converted SoftCredit Amount	Pledge Amount	Pledge Converted Amount	FMV	Name	Batch#	Receipt#	Date	SOL	Type	TY#	Ref	Receipt Delivery	Email	Acknowledged
34420	$200.00	$200.00	$0.00	$0.00	$0.00	$0.00	$0.00	Jeff, James (512045)	0		03/07/2010					Letter		
34421	$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$0.00	Booker, Charles (512046)	0		03/03/2010					Letter		
34418	$0.00	$0.00	$0.00	$0.00	$1,000.00	$1,000.00	$0.00	a-fraike@students.uiuc.edu (37)	0		01/04/2009					Letter	37a-fraike@students.uiuc.edu	
34419	$0.00	$0.00	$0.00	$0.00	$657.00	$657.00	$0.00	George, Jennifer (214)	0		01/03/2009					Letter	214jennifer114773@testemailacct123.com	
Total:		$300.00		$0.00		$1,657.00		Accounting Code:										

GL: Elaines Special Circle (EJ2011)

Gift ID	Amount	Converted Amount	SoftCredit Amount	Converted SoftCredit Amount	Pledge Amount	Pledge Converted Amount	FMV	Name	Batch#	Receipt#	Date	SOL	Type	TY#	Ref	Receipt Delivery	Email	Acknowledged
34426	$50.00	$50.00	$0.00	$0.00	$0.00	$0.00	$0.00	Santiago, Francisco (531767)	0		08/19/2011	EJ11	CA	30		Letter	francisco93603@testemailacct123.com	
34427	$100.00	$100.00	$0.00	$0.00	$0.00	$0.00	$0.00	Reynolds, James (109)	0		08/19/2011		CK	30	5696	Letter	109james105228@testemailacct123.com	
Total:		$150.00		$0.00		$0.00		Accounting Code:										

GL: Unrestricted #1 (UN1)

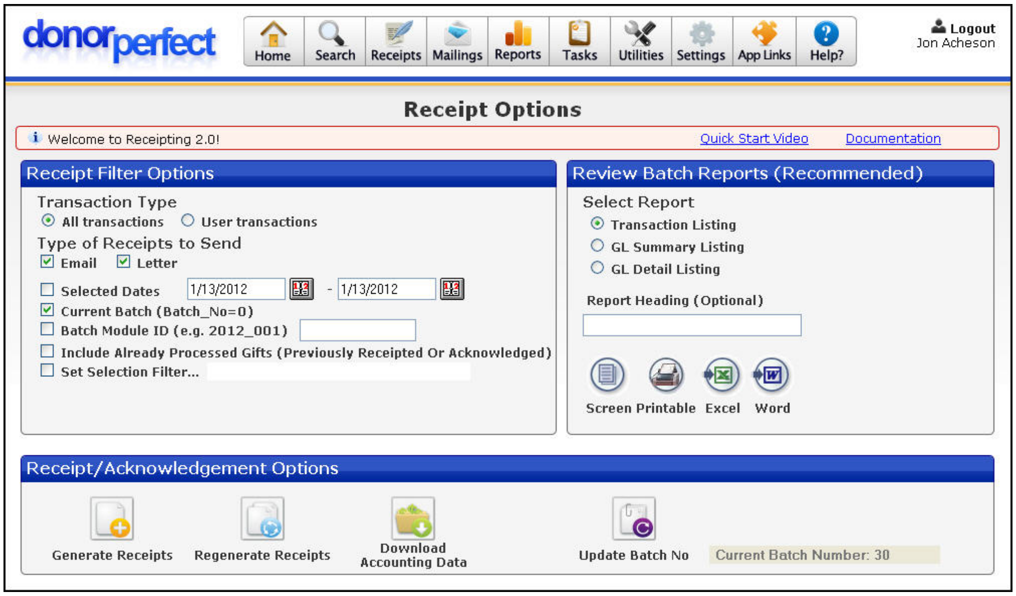
Gift ID	Amount	Converted Amount	SoftCredit Amount	Converted SoftCredit Amount	Pledge Amount	Pledge Converted Amount	FMV	Name	Batch#	Receipt#	Date	SOL	Type	TY#	Ref	Receipt Delivery	Email	Acknowledged
34423	$0.00	$0.00	$10.00	$10.00	$0.00	$0.00	$0.00	Jack, 38 (512041)	0		08/18/2011	HON	SC	01	12345678	Letter	m@m.cm	
Total:		$0.00		$10.00		$0.00		Accounting Code:										

Grand Total:	$450.00	$1,657.00

The GL Detail Listing is a report that can be used to list all of the unprocessed transactions in your system, grouped and sorted by general ledger code.

Step by Step

1. In the navigation bar, click on the **Receipts** button. The Receipt Options screen appears:



2. Under **Receipt Filter Options**, make the following selections:
   a. Under **Transaction Type**, select **User Transactions**.
   b. Check the **Current Batch**.option. This will select only the gifts and pledge payments that are in the current batch.
   c. Make sure the **Include Already Processed Gifts (Previously Receipted or Acknowledged)** option is NOT checked.
3. Under **Review Batch Reports**, set **Select Report** to **GL Detail Listing**.
4. Click the **Screen** button to view the report in your browser.

Pointers

☑ Under **Transaction Type**, the **All Transactions** option will update or download *all transactions* across all users, while the **User Transactions** option will only update or download the transactions for the user currently logged in.

☑ You can select transactions in the current batch by clicking the **Current Batch** button. Or you may select all transactions in a given date range by clicking the Selected Dates button and entering your desired date range in the date boxes.

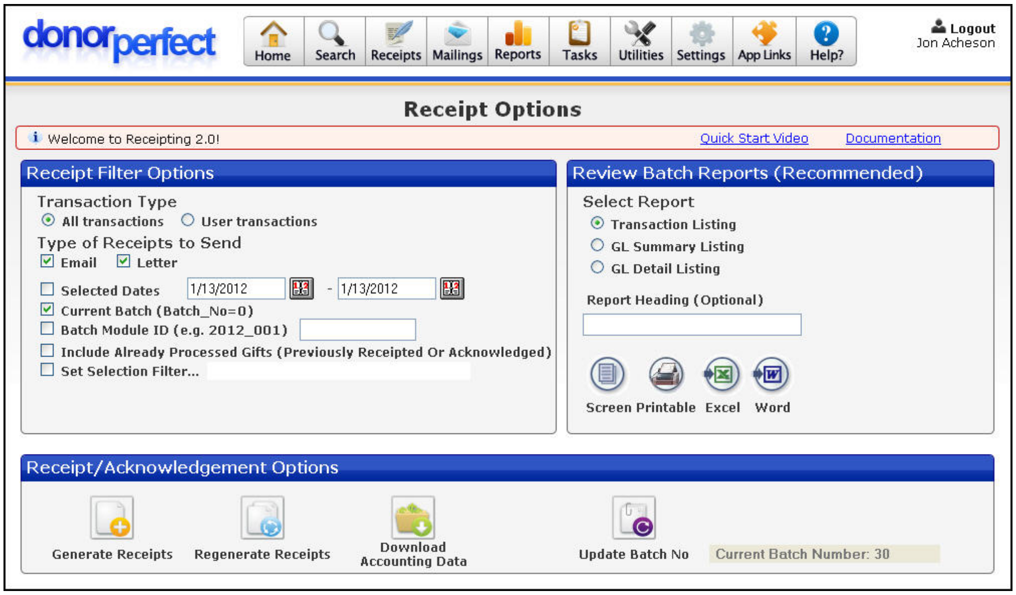
☑ See Running the Acknowledgements/Recepts Reports for details on the GL Detail Listing.

Processing 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.

Step by Step

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



2. Under **Receipt Filter Options**, make the following selections:
   a. Under **Transaction Type**, select **User Transactions**.
   b. Under **Type of Receipts to Send**, check both **Email** and **Letter**.
   c. Check the **Current Batch**.option. This will select only the gifts and pledge payments that are in the current batch.
   d. Make sure the **Include Already Processed Gifts (Previously Receipted or Acknowledged)** option is NOT checked.
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 27 for details.

5. If there are letter receipts to be generated, the Letter Receipts screen appears. This screen allows you to create the mail merge data files that will be used to generate the receipt letters. See "Generating Letter Receipts" on page 30 for details.

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.

6. Once you have finished generating email and letter receipts, you will need to manually update the batch number. See "Updating the Batch Number" on page 33 for details.

Pointers

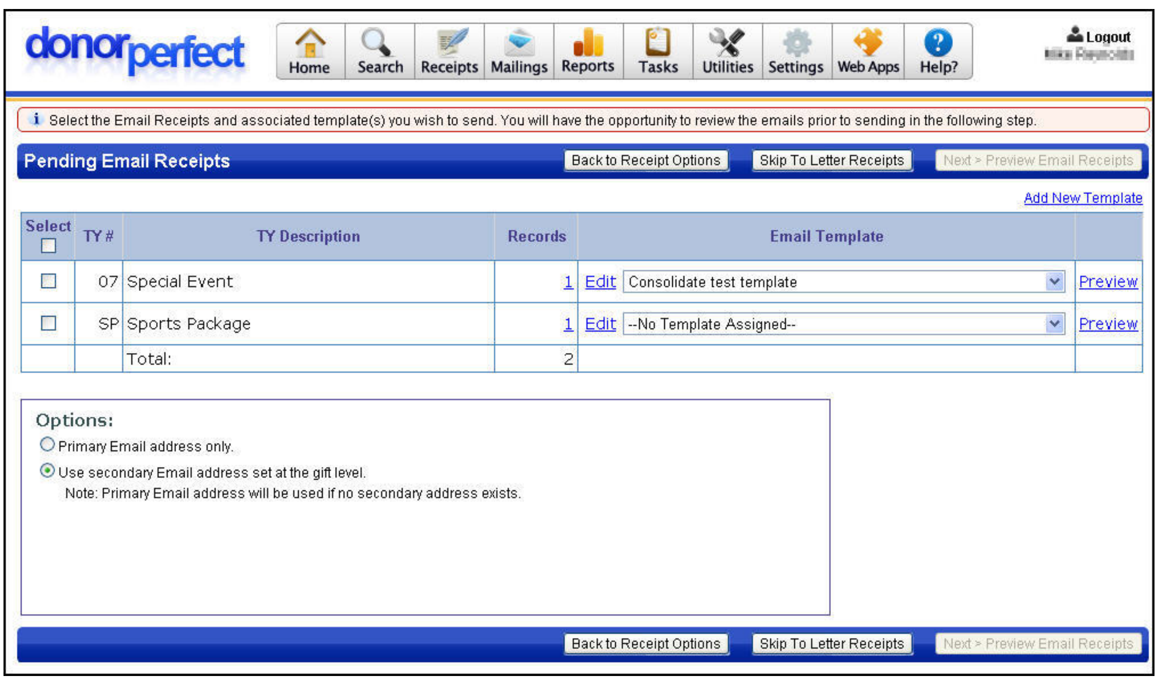
☑ Be sure to click **Save** when the dialog box pops up after clicking **Download.**

☑ Selecting the Thank-You Letter number will determine which data is downloaded, and saved in your mail merge. For instance, if a record has a Thank-You letter number assigned as 2, selecting anything other than 2, or All in One will not pull that record into the download.

☑ For full details on sending out receipts, see [Receipting 2.0].

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.



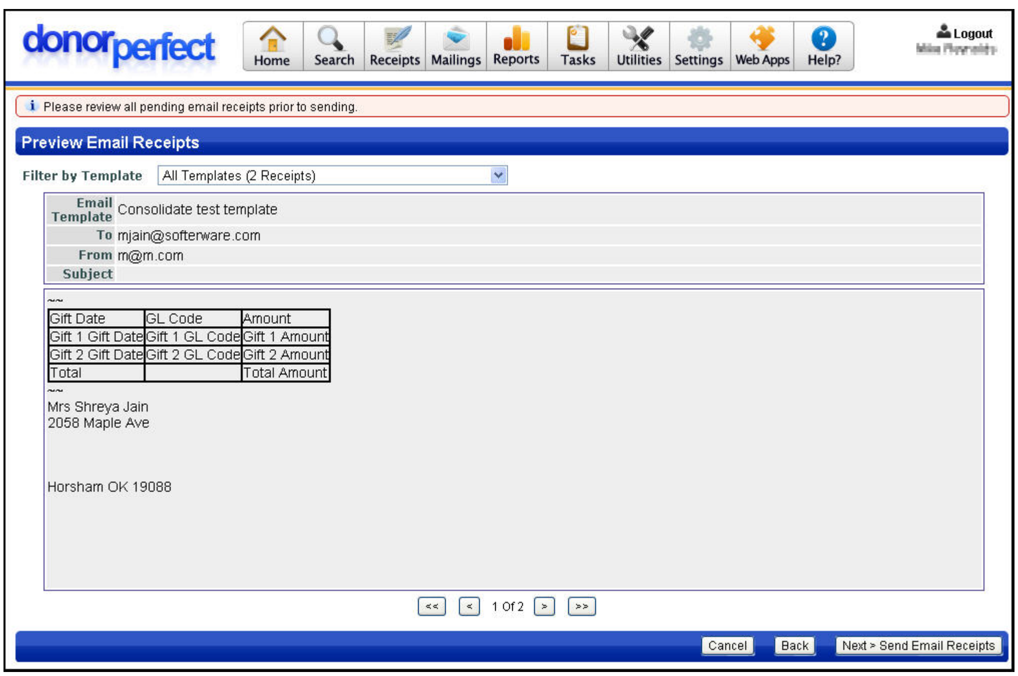
This screen allows you to select the email templates that will be used to send the receipts, and then generate email receipts. The receipts to be sent are grouped by the thank-you letter code (**TY #**) that was entered in the gift records. There is also a category for gifts that did not have a **TY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

Step by Step

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.
3. Set the following options for email receipts:

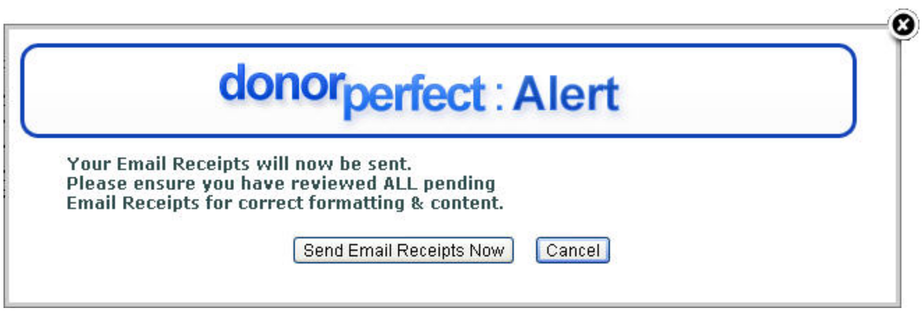
Primary Email address only	If this option is selected, the primary email address for the donor will always be used to email the receipt.
Use secondary Email address set at the gift level	If this option is selected, the donor's secondary email address, if any, will be used to email the receipt for the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

4. 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:

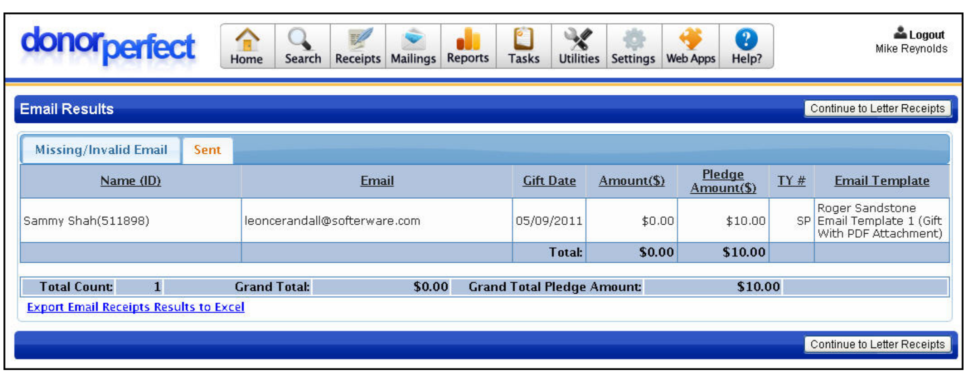


The Preview Email Receipts screen allows you to preview all of your email receipts before they are sent out.

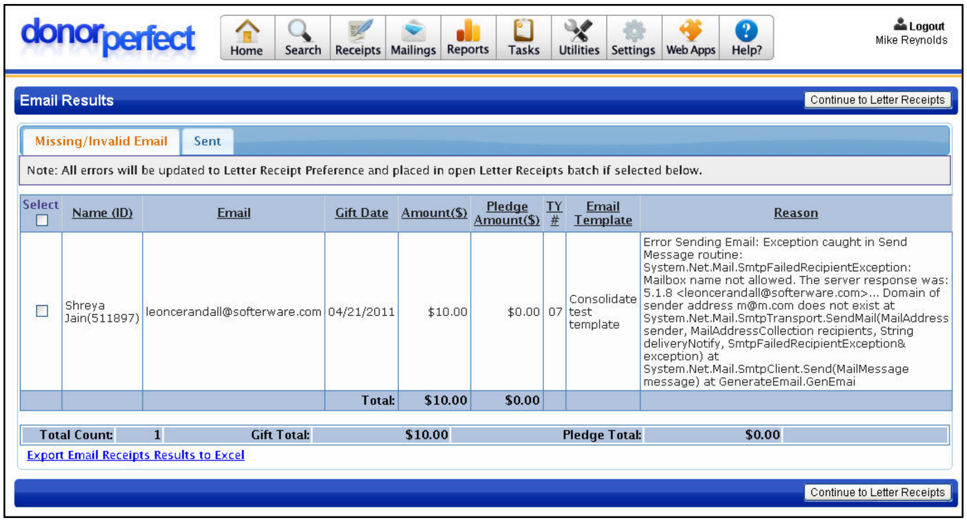
5. The **Filter by Template** list at the top of the screen allows you to change which email receipts are previewed:
   - Select **All Templates** to display the email receipts from every template that was selected in the previous screen.
   - Select an individual template to display only the email receipts that were generated using that template.
6. 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.
7. 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.
8. To send your email receipts after previewing them, click the **Next > Send Email Receipts** button. A confirmation screen will appear:



9. Click the **Send Email Receipts Now** button to send the pending email receipts. 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.



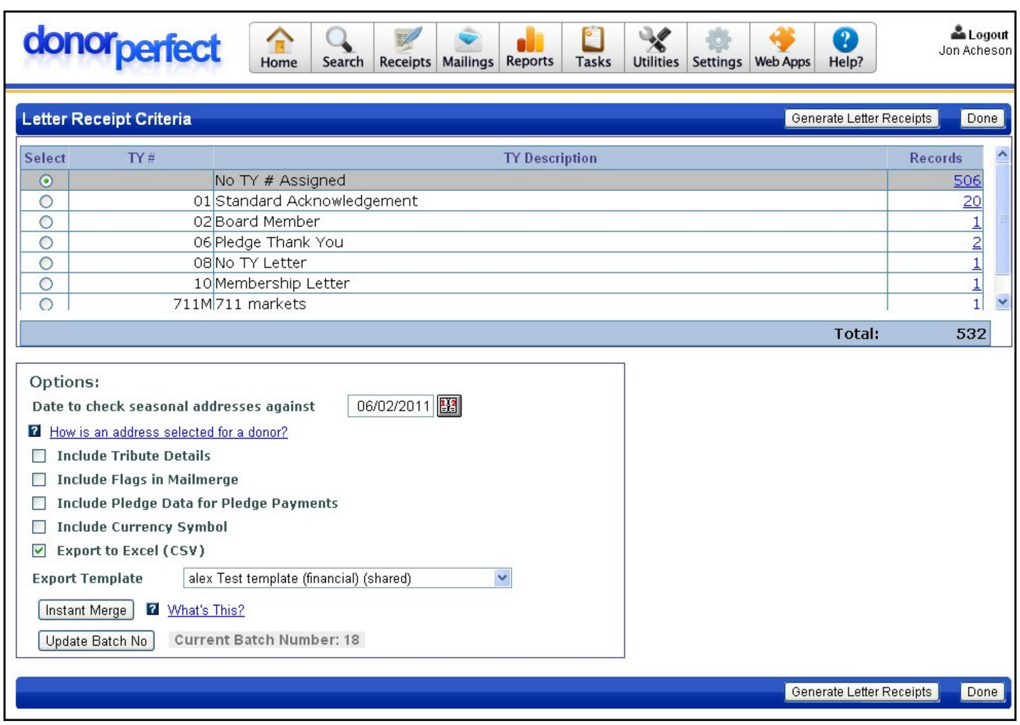
Once you have finished with this screen, click the **Continue to Letter Receipts** button to go to the Letter Receipts screen.

Pointers

☑ For details on email receipts, see Sending Email Receipts in the SofterWare Knowledgebase.

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.

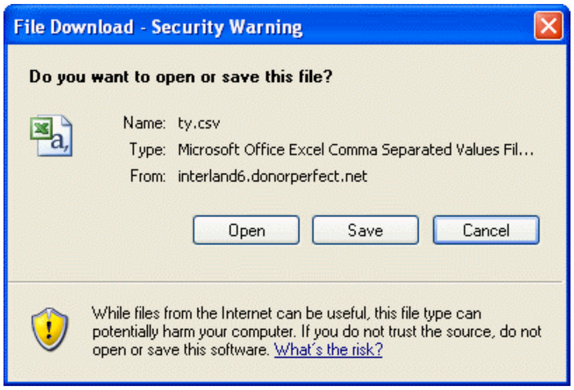


► To generate mail merge data files for individual letter receipts

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 **Error! Bookmark not defined.**.
   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 **Error! Bookmark not defined.** and "Applying a Gift to a Tribute" on page **Error! Bookmark not defined.**.
   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.

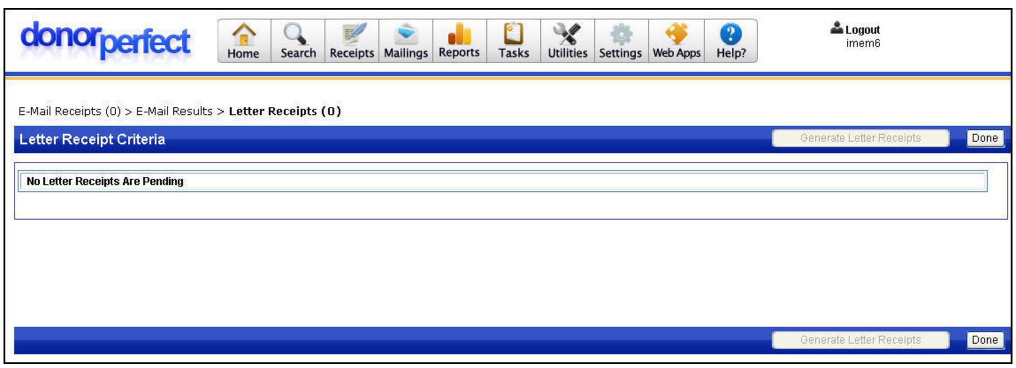
   > Warning! If the Include Currency Symbol option is checked, you will need to edit your mail merge templates to ensure that they do not include the currency symbol as part of their text. Otherwise, your letter receipts could display double currency symbols.

   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 **Error! Bookmark not defined.**.
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.

Pointers

☑ For details on letter receipts, see Generating Letter Receipts with Receipting 2.0.

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.

Pointers

☑ You may also update the batch at the end of the receipt process on the letter receipts screen. When you have downloaded all of your letters, select **"Update Batch No"** to close out the current batch of gifts.

Selection Filters

Almost any time you do anything in DPO, you will use a selection filter. A selection filter selects which records will appear in a table or report, based on criteria you specify. This lets you work with just the records you are interested in at any given time, rather than having to wade through all of the records in your system. Some common selection filters are:

- Select donors from a specific city, state or zip code
- Select the donors who have not made a donation this year
- Select the donors who have given more than X amount this year
- Select the donors who responded to this campaign last year
- Select the donors who have given every year for the last three years

The procedure for creating a Selection Filter is the same regardless of whether you are running a list, creating a mailing, or running a report.

Simple Filters

The filters that you create through the regular menus, such as reports or mailings, are simple filters.

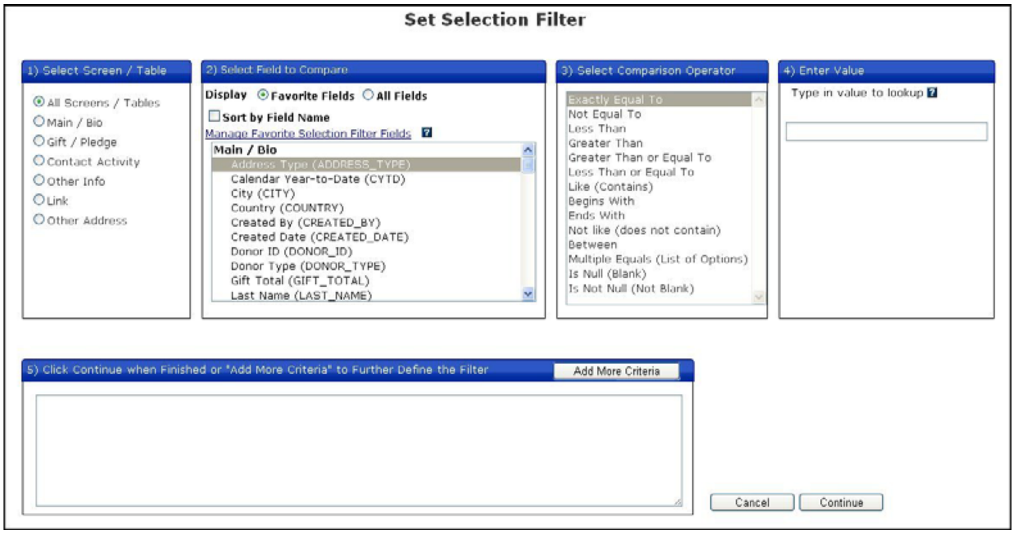
Step by Step

► To select a saved filter

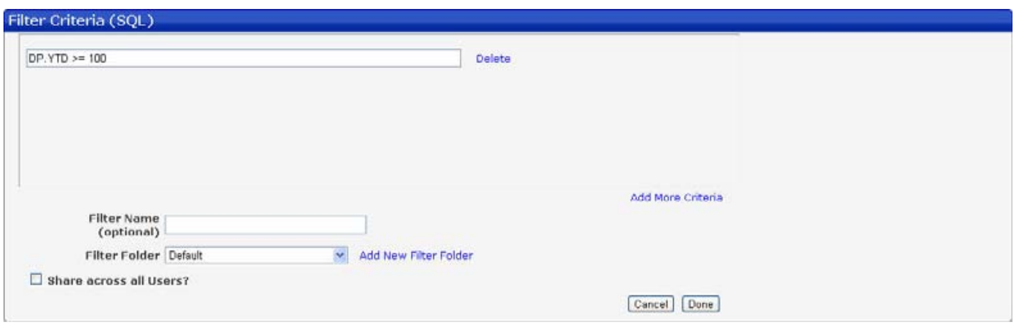
1. Click **Reports**, then **Listings**.
2. Select **Count Records**.
3. Click **Set Selection Filter…**
4. Choose a saved filter such as **New Donors This Year**, and click **Select**.

► To build a new filter

1. Click **Reports**, then **Listings**.
2. Select **Count Records**.
3. Click **Set Selection Filter…**
4. Click **Build New Filter**.



5. Under **1) Select Screen/Table**, select **Main/Bio**.
6. Under **2) Select Field to Compare**, select **Year-to-Date (YTD)**.
7. Under **3) Select Comparison Operator**, select **Greater Than or Equal To**.
8. In the field under **4) Enter Value**, enter **100**.
9. Click the **Continue** button. The Filter Criteria screen appears:



10. In the **Filter Name** field, type **YTD >= $100**.
11. Click the **Done** button. The selection filter will be applied to all reports until you clear it.

Once you have completed the steps above click **View.** You should get a count of all records that match the criteria you selected.

Pointers

☑ You can check and edit your criteria before you finish creating a filter. If the filter does not have the correct criteria, you simply change it directly in the edit box. There is no need to go back and create another filter.

☑ You can also click **Use Last Filter,** or **Build New Compound Filter.** (Compound filters are discussed in the next section.)

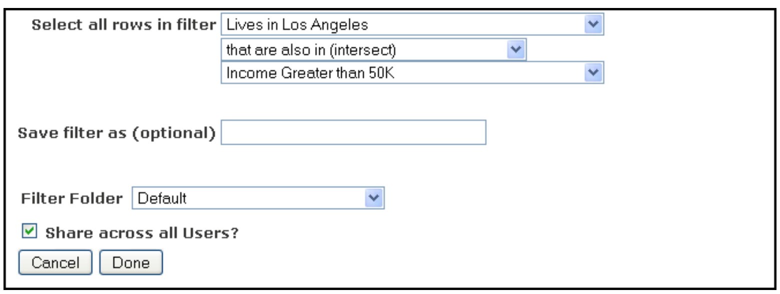
- ☑ Filters can also be accessed through the **Utilities, Filters** section. Here you can edit and delete any filter you have access rights to, as well as create new compound filters.
- ☑ For details on creating, using and maintaining selection filters, see Using Selection Filters in the SofterWare Knowledgebase, or view the Favorite Selection Filter Fields video tutorial.

Compound Filters

A compound filter is a user created filter that uses two simple filters as its criteria. For instance, if you wanted to find "Donors with an income over $50,000 living in Los Angeles," you would combine the filter "Donors Living in Los Angeles" with the filter "Donors Income Over $50,000." Any of your saved filters may be used in combination to create a compound filter. You may also create a compound filter from compound filters to get very specific data.

Step by Step

1. Once in the screen you need, click **Set Selection Filter…**
2. Click **Build New Compound Filter.**



3. Select the filters you want to use in your compound filter.
4. Select one of the following operators:

Intersect	Records selected by the compound filter must test true for both of the simple filter criteria selected. For instance, to get results above, the donor must live in Los Angeles and have an annual income greater than 50,000 dollars.
Union	Records selected by the compound filter must test true for at least one of the simple filter criteria. For instance, a union of the criteria above would give you both those clients that live in LA and those clients that make over $50,000.
Subtract	Records selected by the compound filter must test true for the first (uppermost) simple filter, but test false for the second (lower) filter. (The first set, minus those donors that match the second set.)

5. Enter a name for the compound filter in the **Save Filter As** field.
6. Choose to share or not to share, and click **Done.**

Pointers

- ☑ You may also create your compound filters by entering the **Filter Management Screen** under **Utilities.**
- ☑ See Creating a Compound Selection Filter in the SofterWare Knowledgebase for more information on compound selection filters.

Sharing Filters and Security Rights

After building your filter, you will need to choose to share or not share your filter before you save it. If you share your filter any user working in your program will be allowed to use the filter but not edit or delete it. If you create a filter that is not shared, no other users may see it, even if those users have security rights. If you create a filter that is shared, however, any user may see it, though only those with security rights may edit or delete it.

Reports

So here we are; the real stuff. Not to put down data entry, but what would be the point of a database if you couldn't use any of the data?! The Reports section is your basic means of viewing your data.

Creating Listings

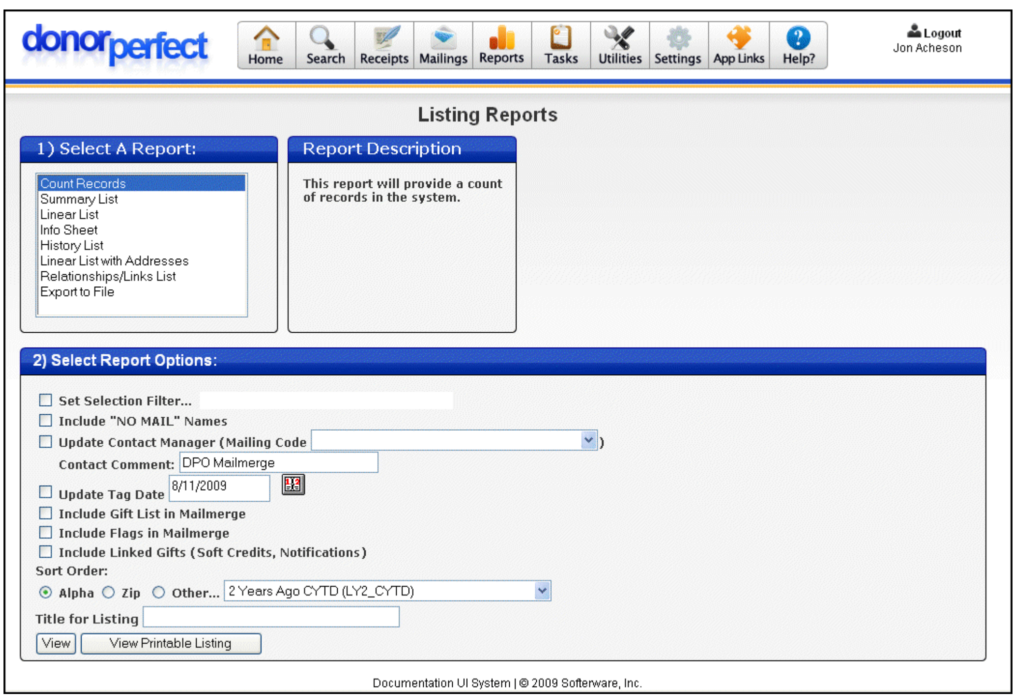
The time has come to get something out of your database. Just like food, a database is only as good as the ingredients; so good data entry is the key to getting good use of your database.

There are several types of Listings. The **Count Records** option only gives you a record count for whatever criteria you use. The **Summary List** option gives you the name, address, phone number and a short listing of gift totals for each record. The **Linear List** provides a more detailed view of donor giving.

Getting to the Listings Screen is even easier than the Data Entry Screen. You just click **Reports**, and then click **Listings.** We are going to create a Summary List, which is a summary of all the records you request. Once you are there, here's the **Step by Step.**

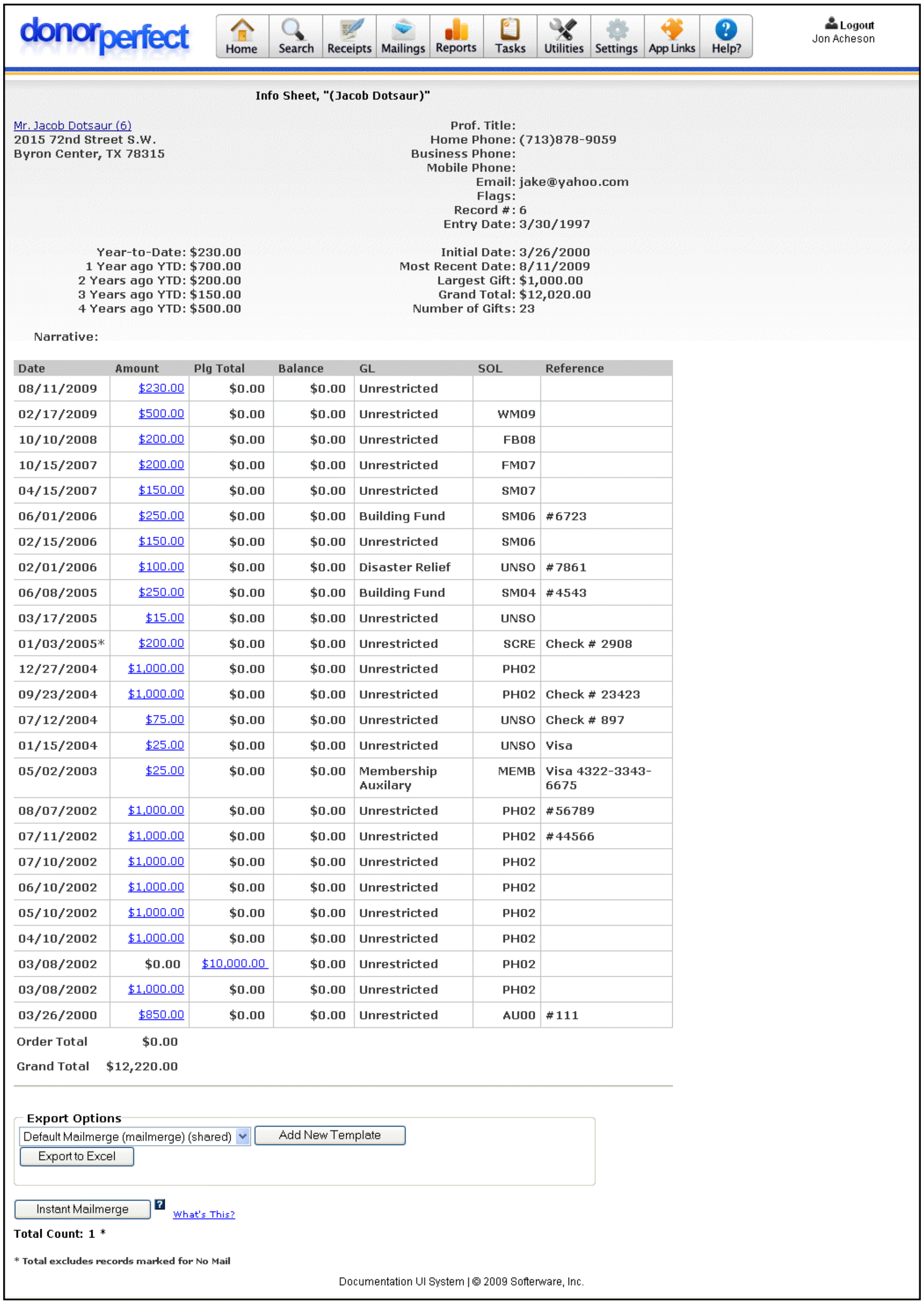
Step by Step

1. From the Navigation bar, select **Reports** and then click the **Listings** link. The **Listing Reports** screen appears.



2. Click Count Records, Summary List, Linear List, Info Sheet, or History List. (Whichever you need.)

3. Click View.



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	Plg 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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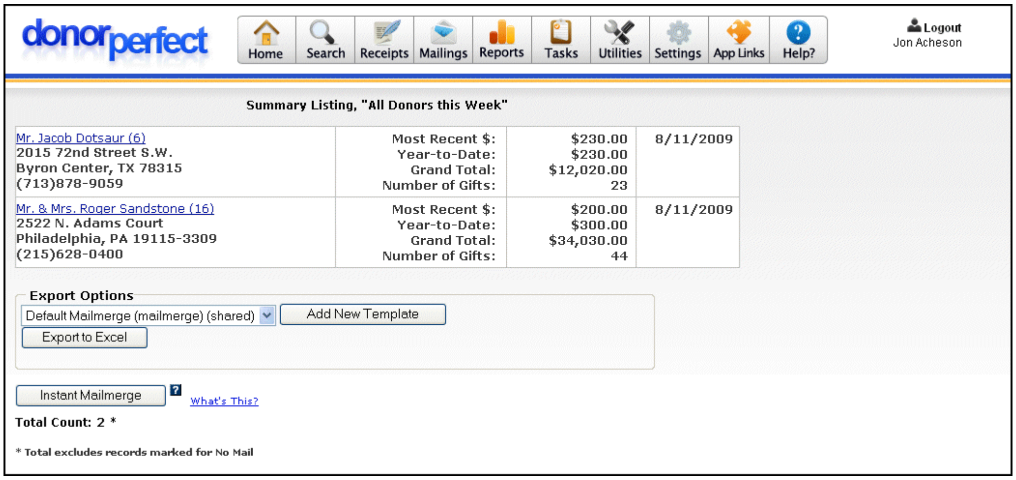
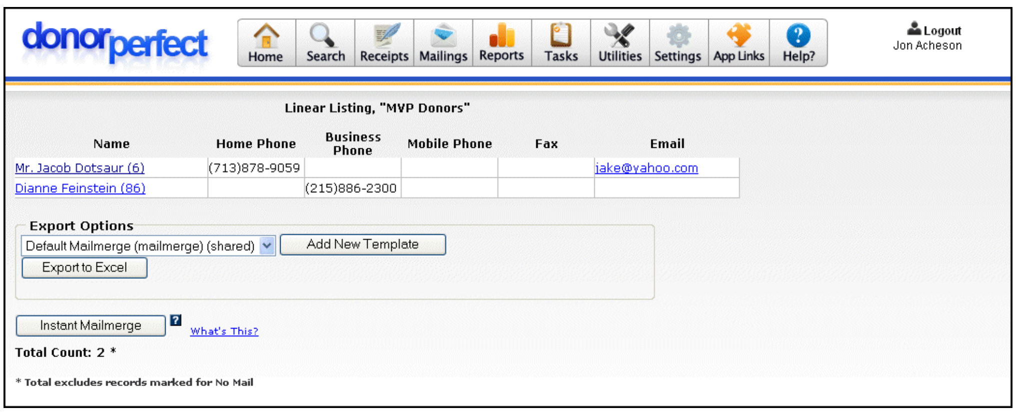
Info Sheet



Summary List



Linear List

Pointers

- ☑ This has created a Summary List of your entire database. You normally will want to use a Filter, which is explained later in this guide.
- ☑ You can alter the Sort Order by clicking the Alpha, Zip, or Other buttons. With Other, you select your sort criteria from the pull-down list.
- ☑ For more information on listings, see Using Listings or the Running a Listing training video in the SofterWare Knowledgebase.

Contact Management

The contact manager allows you to schedule contact events for the future, as well as view all previous contacts with a given donor. This will give you the power to pull up your personal contact list, as well as all other user's contact list in your database.

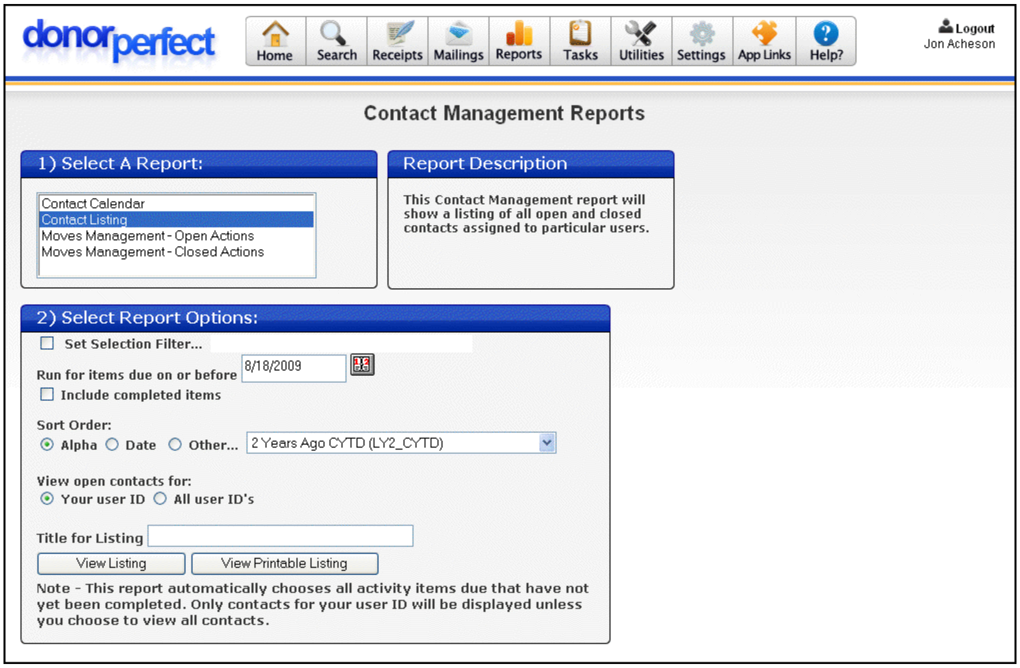
Contact Listing

If we wanted to run a report of all contacts scheduled by employees or volunteers, we could do that through the Contact Manager function. Click **Reports,** then click **Contact Manager.** From there it is just a step by step process.

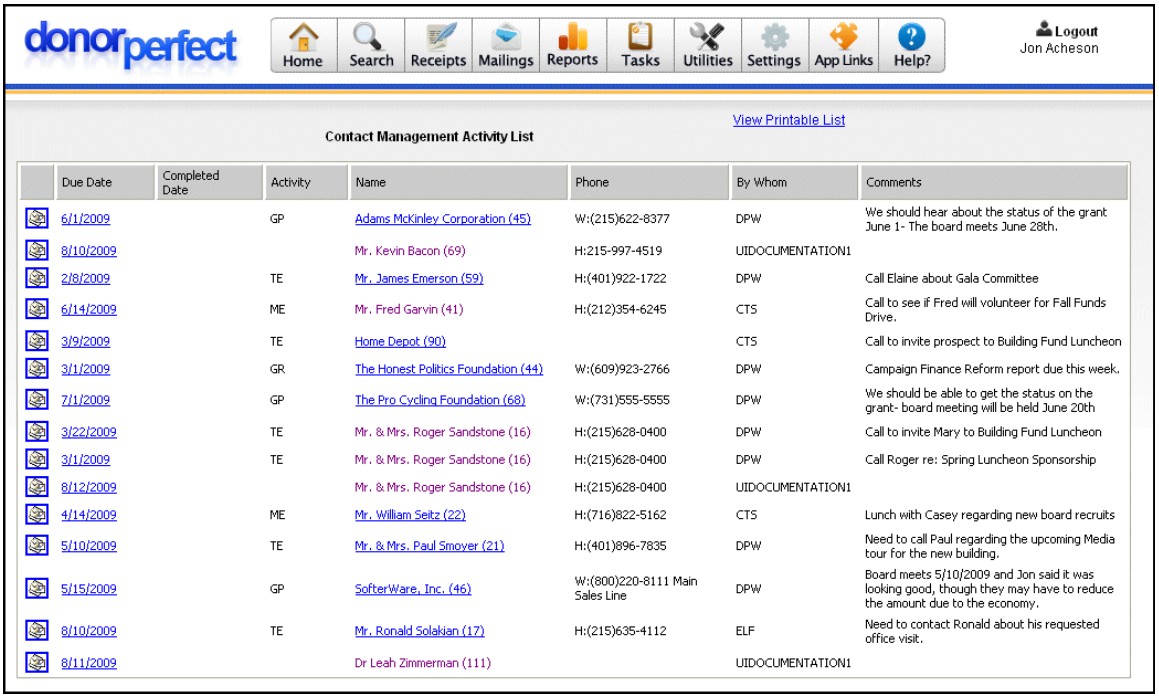
Step by Step

To view a listing of all uncompleted contacts:

1. Under **Select a Report**, select **Contact Listing**.



2. In the **"Run for Items…"** box, keep the current date.
3. Do not check the **Include Completed Items** checkbox.
4. Set **View open contacts for:** to **All User IDs.**
5. In the **Title for Listing** box type **"Non-completed Contacts."**
6. Click **View Listing.**



Due Date	Completed Date	Activity	Name	Phone	By Whom	Comments
6/1/2009		GP	Adams McKinley Corporation (45)	W:(215)622-8377	DPW	We should hear about the status of the grant June 1- The board meets June 28th.
8/10/2009			Mr. Kevin Bacon (69)	H:215-997-4519	UIDOCUMENTATION1	
2/8/2009		TE	Mr. James Emerson (59)	H:(401)922-1722	DPW	Call Elaine about Gala Committee
6/14/2009		ME	Mr. Fred Garvin (41)	H:(212)354-6245	CTS	Call to see if Fred will volunteer for Fall Funds Drive.
3/9/2009		TE	Home Depot (90)		CTS	Call to invite prospect to Building Fund Luncheon
3/1/2009		GR	The Honest Politics Foundation (44)	W:(609)923-2766	DPW	Campaign Finance Reform report due this week.
7/1/2009		GP	The Pro Cycling Foundation (68)	W:(731)555-5555	DPW	We should be able to get the status on the grant- board meeting will be held June 20th
3/22/2009		TE	Mr. & Mrs. Roger Sandstone (16)	H:(215)628-0400	DPW	Call to invite Mary to Building Fund Luncheon
3/1/2009		TE	Mr. & Mrs. Roger Sandstone (16)	H:(215)628-0400	DPW	Call Roger re: Spring Luncheon Sponsorship
8/12/2009			Mr. & Mrs. Roger Sandstone (16)	H:(215)628-0400	UIDOCUMENTATION1	
4/14/2009		ME	Mr. William Seitz (22)	H:(716)822-5162	CTS	Lunch with Casey regarding new board recruits
5/10/2009		TE	Mr. & Mrs. Paul Smoyer (21)	H:(401)896-7835	DPW	Need to call Paul regarding the upcoming Media tour for the new building.
5/15/2009		GP	SofterWare, Inc. (46)	W:(800)220-8111 Main Sales Line	DPW	Board meets 5/10/2009 and Jon said it was looking good, though they may have to reduce the amount due to the economy.
8/10/2009		TE	Mr. Ronald Solakian (17)	H:(215)635-4112	ELF	Need to contact Ronald about his requested office visit.
8/11/2009			Dr Leah Zimmerman (111)		UIDOCUMENTATION1	

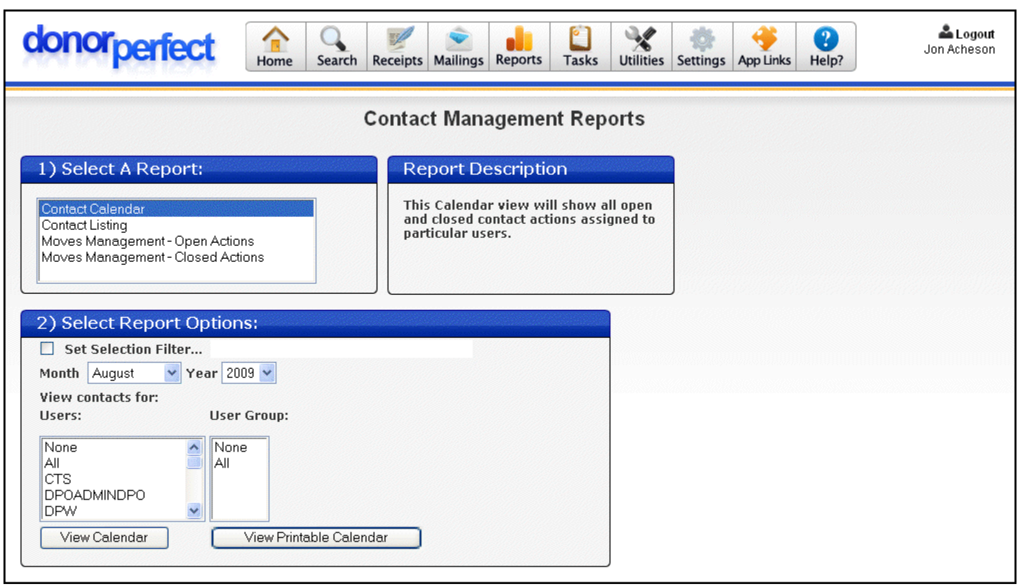
Contact Listing Report

If you click on the donor name, you go into the main page for that donor. If you click on the date, you go into the page for the contact itself.

Contact Calendar

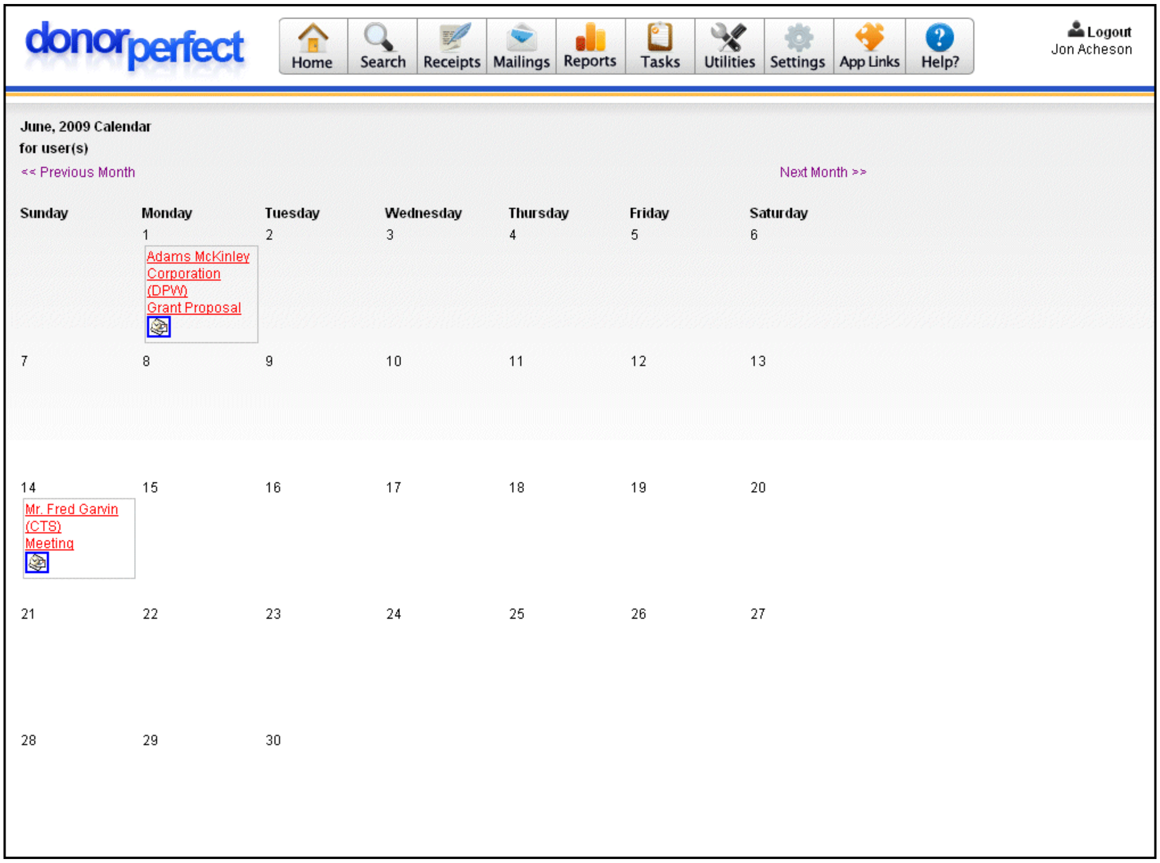
To View Calendar:

1. Under **Select a Report**, select **Contact Listing**.



2. Choose the month and year for which you would like to view contacts.
3. For **"View Open Contacts For…"** select **All**.

4. Click **View Calendar.**



If you click on a calendar listing, you go to the page for that contact.

Pointers

- ☑ Your login ID and your "by whom" code must be the same for the login reminder to work properly. (Do not use initials, but the full login ID.)
- ☑ Be sure to enter today's date in the contact field, with either a due date, or the completed date filled in as well.
- ☑ It is possible to schedule events for users other than yourself. This enables you to hand off a contact to another member of your staff.
- ☑ For more information on Contact Manager reports, see Using Contact Manager Reports in the SofterWare Knowledgebase.

Financial Reports

The **Solicitation Analysis** will report each solicitation's monetary success. It gives the income, the expenses, and the income to expense ratio for each solicitation.

The **Multi-Year Trend Analysis** gives you a side by side comparison of previous years, however far back you choose to go.

*DPO comes packed with several other Financial Reports. They all operate in a similar fashion. For more detail, refer to your DPO Manual.

Solicitation Analysis

Step by Step

To output a Solicitation Analysis:

1. At the top of the screen, click **Reports,** then **Financial.**

2. Under **Select a Category**, choose **Direct Mail Reports**, and then select **Solicitation Analysis** in the the **Select a Report** section.

3. Select the **Date Range.**

4. Click  to view the report**.**

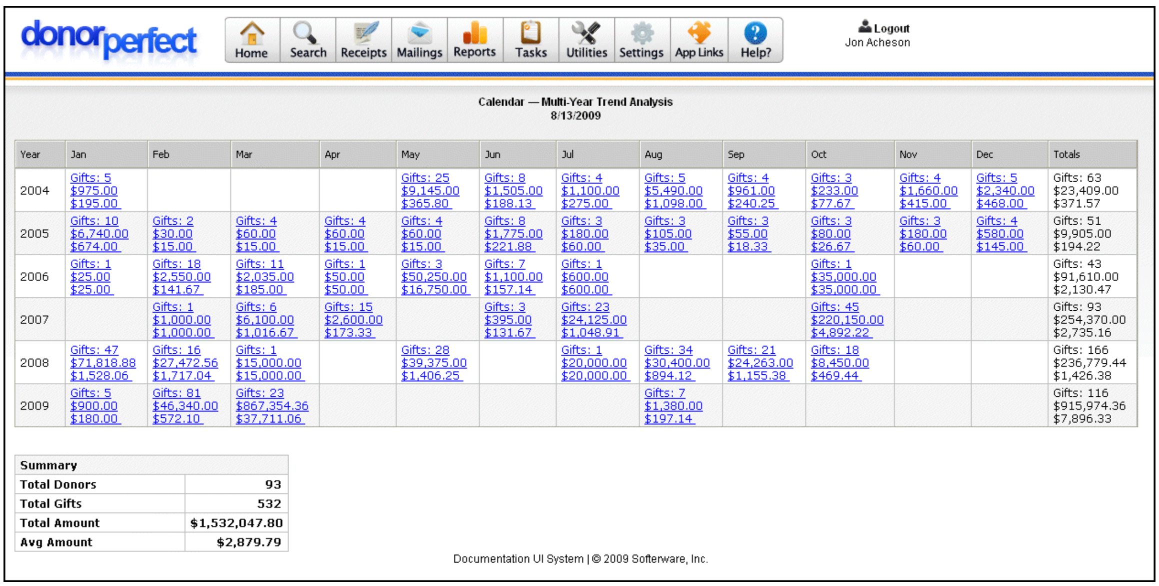
Solicitation Report for 01/01/2009 thru 8/14/2009

			INCOME					EXPENSES				RATIOS			GOAL		
Date	Code	Description	Mailed	Response #	Response %	Total Income	Avg. Gift	Printing	Other	Total	Net Income	Net per $ spent	Cost per 1000	Revenue per 1000	Goal	Total Income To Goal	% Total Income To Goal
	NO CODE		0	16		$55,009.36	$3,438.09	$0.00	$0.00	$0.00	$55,009.36		N/A	N/A	$0.00	$55,009.00	
	0		0	2		$500.00	$250.00	$0.00	$0.00	$0.00	$500.00		N/A	N/A	$0.00	$500.00	
	FB08	Fall Banquet 2008	0	6		$1,150.00	$191.67	$0.00	$0.00	$0.00	$1,150.00		N/A	N/A	$0.00	$1,150.00	
	GF09	Golf Tournament 2009	0	32		$8,750.00	$273.44	$0.00	$0.00	$0.00	$8,750.00		N/A	N/A	$0.00	$8,750.00	
	PERS	Personal Solicitation	0	7		$865,000.00	$123,571.43	$0.00	$0.00	$0.00	$865,000.00		N/A	N/A	$0.00	$865,000.00	
	WM09	Winter Mailing 2009	0	58		$39,265.00	$676.98	$0.00	$0.00	$0.00	$39,265.00		N/A	N/A	$0.00	$39,265.00	
Total:			**0**	**121**	**0**	**$969,674.36**	**$8,013.84***	**$0.00**	**$0.00**	**$0.00**	**$969,674.36**	**0**	**N/A**	**N/A**	**$0.00**	**$969,674.00**	

* Note: This amount indicates the average amount of all gifts rather than the sum of all average gift amounts.
* Note: Green Font means that Goal was Exceeded.

Solicitation Analysis Report

To view the Multi-Trend analysis, repeat the above steps, but choose **Multi Year Trend Analysis** for the report type.



Calendar — Multi-Year Trend Analysis
8/13/2009

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals
2004	Gifts: 5 $975.00 $195.00				Gifts: 25 $9,145.00 $365.80	Gifts: 8 $1,505.00 $188.13	Gifts: 4 $1,100.00 $275.00	Gifts: 5 $5,490.00 $1,098.00	Gifts: 4 $961.00 $240.25	Gifts: 3 $233.00 $77.67	Gifts: 4 $1,660.00 $415.00	Gifts: 5 $2,340.00 $468.00	Gifts: 63 $23,409.00 $371.57
2005	Gifts: 10 $6,740.00 $674.00	Gifts: 2 $30.00 $15.00	Gifts: 4 $60.00 $15.00	Gifts: 4 $60.00 $15.00	Gifts: 4 $60.00 $15.00	Gifts: 8 $1,775.00 $221.88	Gifts: 3 $180.00 $60.00	Gifts: 3 $105.00 $35.00	Gifts: 3 $55.00 $18.33	Gifts: 3 $80.00 $26.67	Gifts: 3 $180.00 $60.00	Gifts: 4 $580.00 $145.00	Gifts: 51 $9,905.00 $194.22
2006	Gifts: 1 $25.00 $25.00	Gifts: 18 $2,550.00 $141.67	Gifts: 11 $2,035.00 $185.00	Gifts: 1 $50.00 $50.00	Gifts: 3 $50,250.00 $16,750.00	Gifts: 7 $1,100.00 $157.14	Gifts: 1 $600.00 $600.00			Gifts: 1 $35,000.00 $35,000.00			Gifts: 43 $91,610.00 $2,130.47
2007		Gifts: 1 $1,000.00 $1,000.00	Gifts: 6 $6,100.00 $1,016.67	Gifts: 15 $2,600.00 $173.33		Gifts: 3 $395.00 $131.67	Gifts: 23 $24,125.00 $1,048.91			Gifts: 45 $220,150.00 $4,892.22			Gifts: 93 $254,370.00 $2,735.16
2008	Gifts: 47 $71,818.88 $1,528.06	Gifts: 16 $27,472.56 $1,717.04	Gifts: 1 $15,000.00 $15,000.00		Gifts: 28 $39,375.00 $1,406.25		Gifts: 1 $20,000.00 $20,000.00	Gifts: 34 $30,400.00 $894.12	Gifts: 21 $24,263.00 $1,155.38	Gifts: 18 $8,450.00 $469.44			Gifts: 166 $236,779.44 $1,426.38
2009	Gifts: 5 $900.00 $180.00	Gifts: 81 $46,340.00 $572.10	Gifts: 23 $867,354.36 $37,711.06					Gifts: 7 $1,380.00 $197.14					Gifts: 116 $915,974.36 $7,896.33

Summary	
Total Donors	93
Total Gifts	532
Total Amount	$1,532,047.80
Avg Amount	$2,879.79

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Multi-Trend Analysis Report

Pointers

- ☑ Most often, you will use a filter to select the specific data you are looking for, but since we have not discussed filters yet, do not select a filter.
- ☑ As with all DPO reports, you can drill down into the data by clicking the hypertext within the report.
- ☑ With the Multi-Year Trend Analysis you cannot create a printable listing.
- ☑ For full details on financial reports, covering every available report, see [Using Financial Reports]() in the SofterWare Knowledgebase.

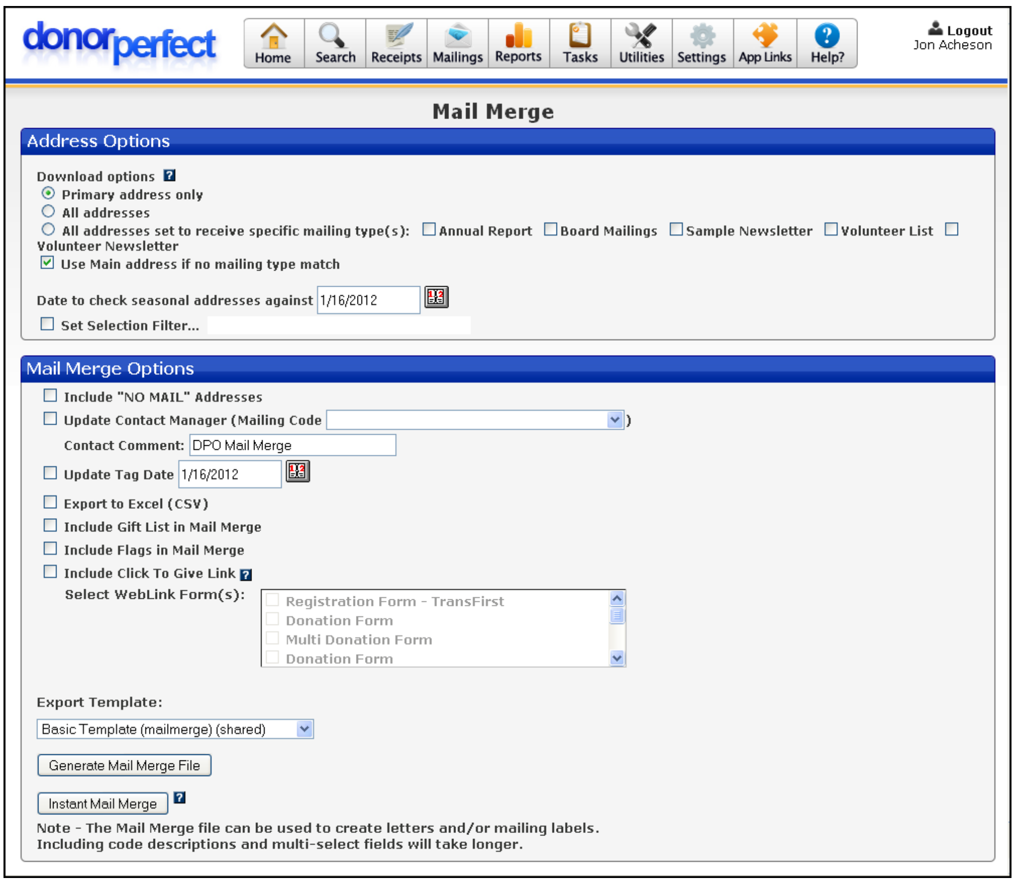
Mailings

Downloading Data into Excel

If you need to export your data, or a portion of it, to Microsoft Excel in a comma delimited file (CSV), you can do this through **Mailings.** You can select specific data using a selection filter to mail to the exact donors you want. To create a mail merge file, follow the Step by Step.

Step by Step

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



2. Check the **Export to Excel (CSV)** checkbox.

3. If you want any other options, such as "No Mail" Names, etc. then check those boxes.

4. When finished making your selections, click the **Generate Mail Merge File** button**.**

5. Click the **Save** button on the file download window when it pops up.

6. Open the MS-Word document you need, and under **Tools** click **Mail Merge…**
7. Select your data source, which is the file you just downloaded.
8. Click **Merge Data with the Document.**
9. Print the document, and the mailing addresses should have been carried over into the document.

Pointers

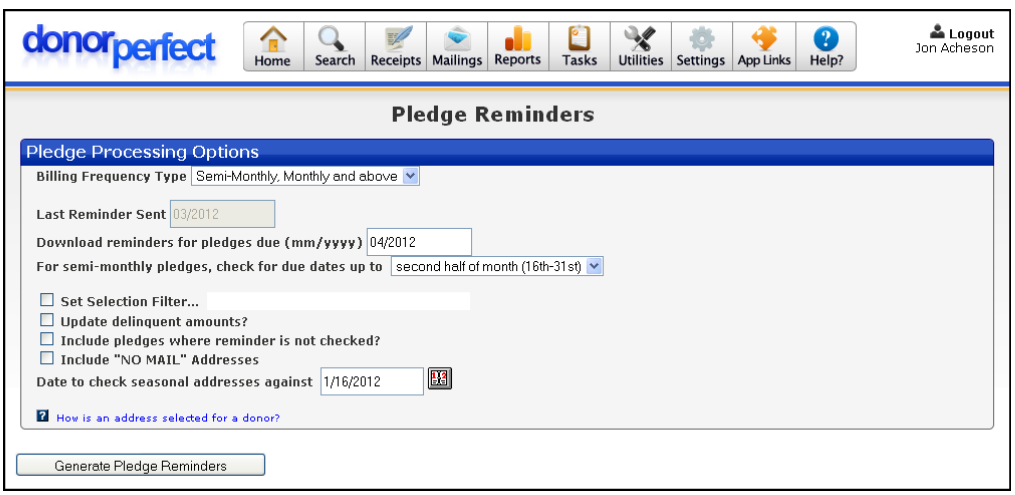
- ☑ You will always use a selection filter when performing a mail merge, except in rare cases where you want to send mail to your entire database. See the section on Filters.
- ☑ The Update Contact Manager checkbox, if checked, will update the contact records with a mailing code, letting you know that each donor in the filter received a mailing.
- ☑ For full details on Mail Merge, see Using the Mail Merge Screen, and the DPO Mail Merge Guide, in the SofterWare Knowledgebase.

Processing Pledge Reminders

Every so often, you may want to send a reminder to those donors that have outstanding pledges. DPO has a screen dedicated to this purpose.

Step by Step

1. From the navigation bar, click **Tasks** and then click **Pledge Processing**. The Pledge Reminders screen appears.



2. Check to make sure the reminders have not been sent in your current month.
3. Click the **Generate Pledge Reminders** button.
4. Save the **.txt** file to your computer.
5. Run a mail merge in MS-Word with the .txt file you downloaded, just as in the previous section.

Pointers

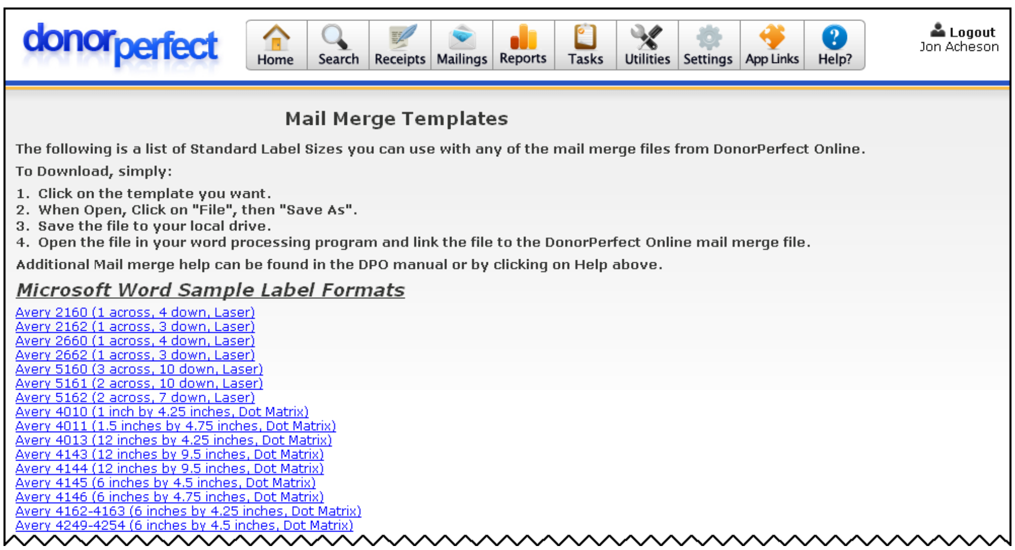
- ☑ To get accurate pledge reports, you must process pledges (check the **Update Delinquent Amounts?** checkbox) *exactly* once per month. More than that, and your totals will be too high, less than that and your totals will be too low.
- ☑ For more information on running monthly pledge reminders and updating balances and amounts, see Using the Pledge Reminders Screen in the SofterWare Knowledgebase.

Mail Merge Templates

There are numerous templates included in DPO. You can use these templates to print labels for various commercially available mailing labels. There are also a few mail merge letter templates.

Step by Step

1. From the navigation bar, select **Mailings**, then select **Mail Merge Templates**.



2. Click on the link for the mail merge template you want to download and use.
3. When prompted to save the file or open it in an app, click **Save** and store them to a folder on your computer.

Pointers

- ☑ Once you have saved the template to your hard drive, you run the mail merge functionality in your word processing software.
- ☑ Be sure that the mail merge file you need matches the mail merge file you downloaded.
- ☑ For additional details, see Using the Mail Merge Templates Screen in the SofterWare Knowledgebase.

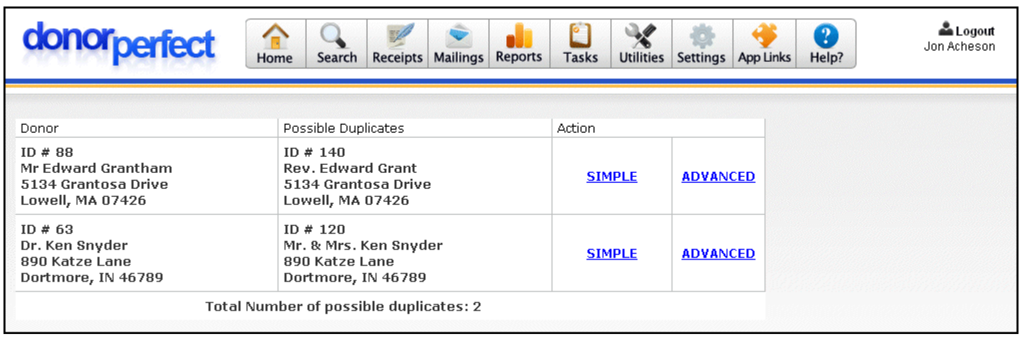
Utilities

Duplicate Maintenance

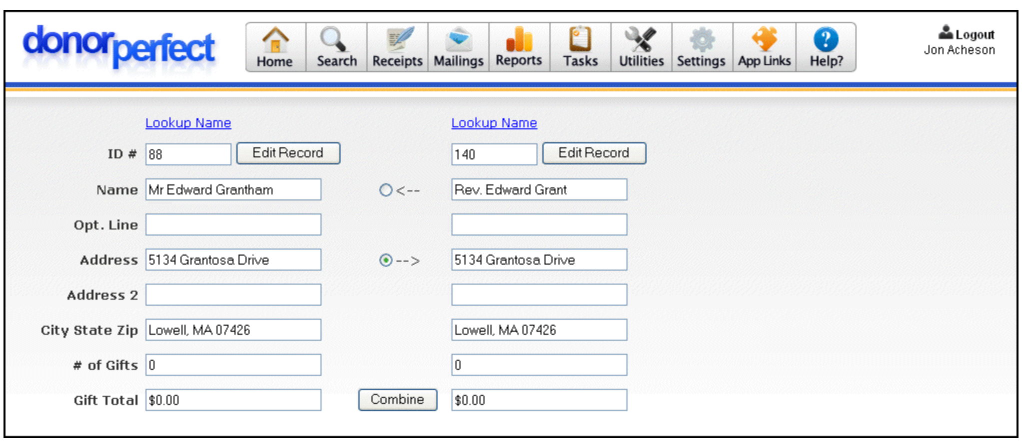
Any time you upload data to your database, whether it be a backup, or a new mailing list from a publication, you will run the risk of uploading duplicate records. It will save your organization money if you can delete or merge the duplicate records, to prevent the expense of sending out duplicate mailings to the same individual.

Step by Step

1. Click **Utilities**, then **Duplicate Removal**.
2. Leave all defaults selected.
3. Click **Show Report**.



4. When the report comes up, select a record, and click **Simple**.



5. When the duplicates come up side by side, pick the record that has the most accurate information, and click **Combine**.

Pointers

☑ Occasionally, two records will contain slightly different information, always be sure to check your data, and combine the correct direction to keep the good information, and lose the bad information.

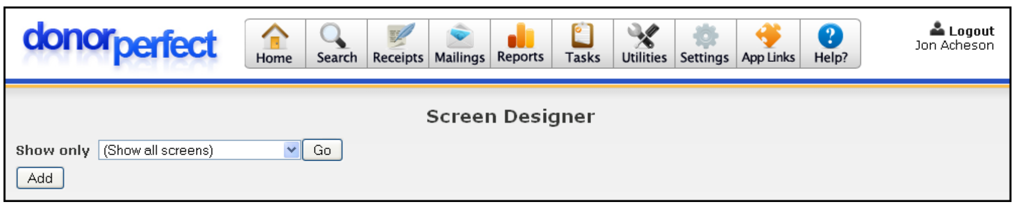
☑ For more information about duplicate removal, see Using the Duplicate Removal Screen in the SofterWare Knowledgebase.

Screen Designer (User Defined Fields)

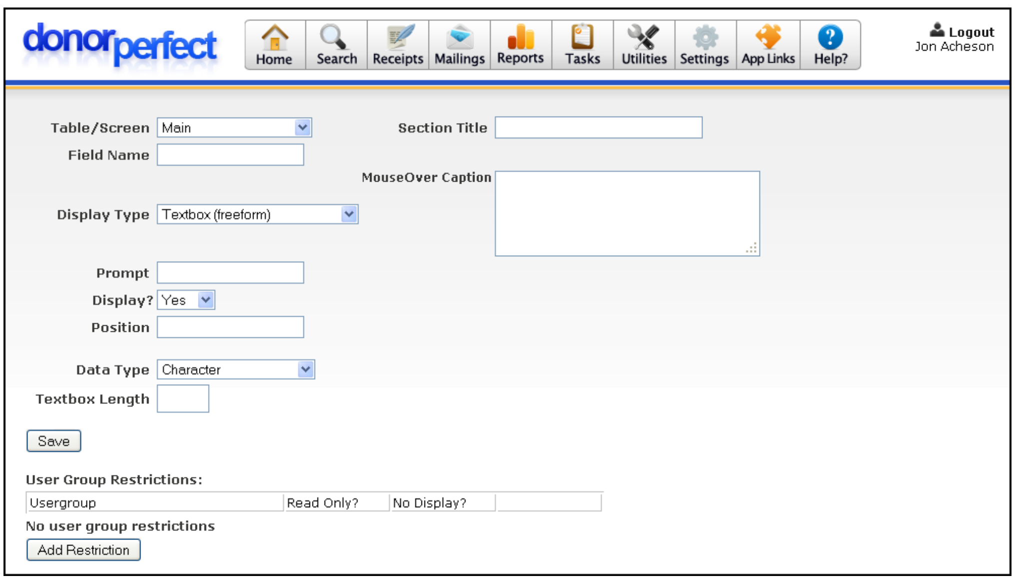
By creating your own fields, you can customize your data entry screens to fit your specific organization's needs. Similarly to codes, you should develop a system for field creation, and stick to it. This will make your data entry screens easier to navigate, and they will look cleaner.

Step by Step

1. Click **Settings**, then **Screen Designer**.



2. Click **Add**.



3. Enter a **Field Name** with no spaces. Use an underscore to break up a field name into multiple words for readability (**Field_with_spaces**).

4. Enter a **Prompt**, which is the label that will display on screen next to the field.

5. Click **Save**.

Pointers

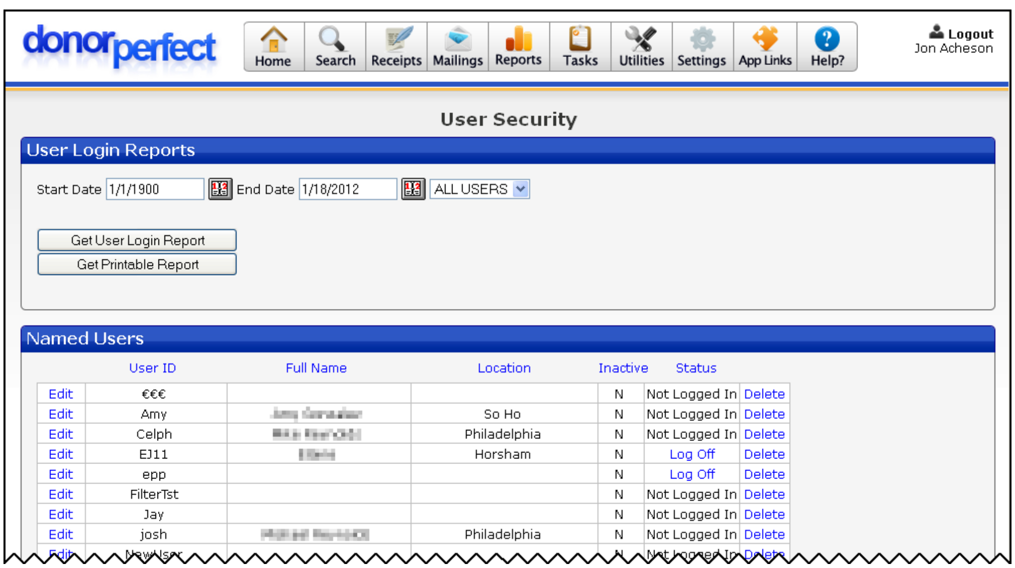
- ☑ You may add restrictions, which will either make the field read-only for certain users or hide it from certain users. To take advantage of this function, you must first create user groups in **Security** under **Utilities.**
- ☑ The position of your new field is assigned by selecting a number that is between two other field's position numbers.
- ☑ You may enter a line separator, as well as a caption for the section, by selecting yes for **Display Separator Line**, and entering a caption in the box labeled **Caption to Display Above this Section.**
- ☑ See Using the Screen Designer in the SofterWare Knowledgebase for more information on adding fields to screens.

Security

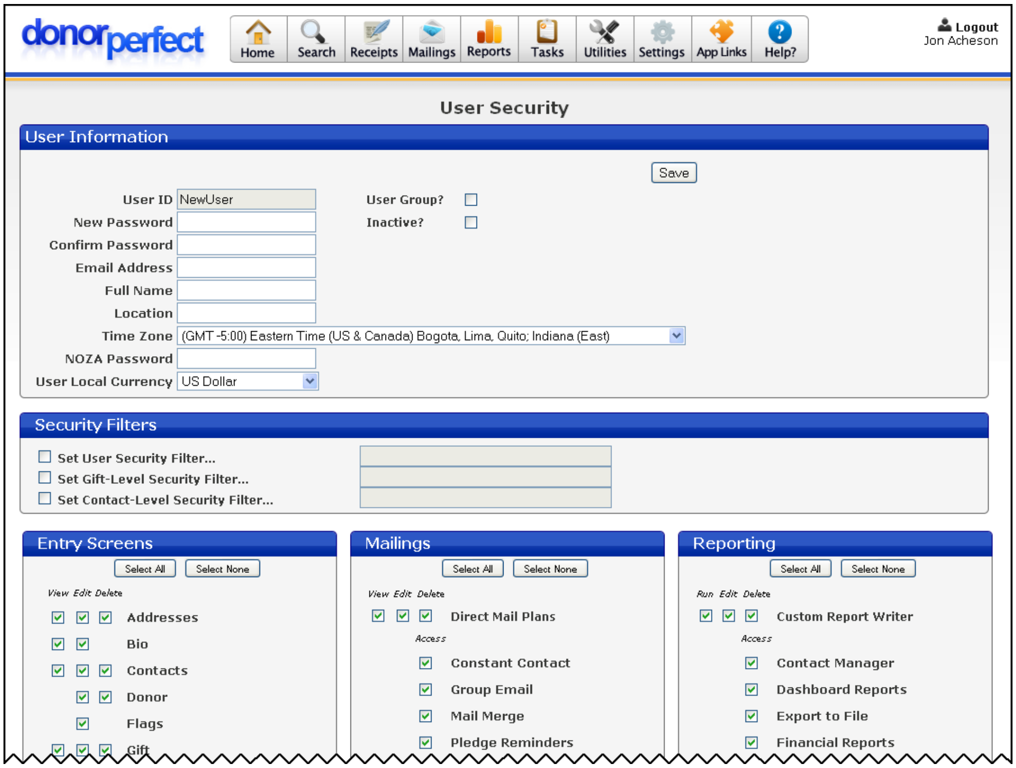
Security enables you to change your password, determine what data and functionality users have, and create user groups for your users. User groups enable you to select security settings for a group of users, instead of one user at a time. If a user is in a user group that has different restrictions than their own, the user's security rights will reflect the most restrictive of the two.

Step by Step

1. From the navigation bar, select **Settings**, then select **User Security**.



2. Click the **Edit** link for the user whose security settings you want to edit.



3. Select the rights for that user, and click the **Save** button.

Pointers

☑ 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**, and **Settings**. 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 edit the information in that area of the system.

☑ To choose all of the options for an area, click the **Select All** button. To deselect all areas and their components, click the **Select None** button.

☑ In the **App Links** section, you can select which external web applications the user can access via DonorPerfect Online.

☑ See Using the User Security Screen in the SofterWare Knowledgebase for details on configuring user security settings.

What Else Can You Do in DonorPerfect Online?

In this guide, you learned how to set up DonorPerfect Online codes, manage donor information, and run reports. The knowledge and skills you've gained will give you a firm foundation as you continue to learn more about DonorPerfect.

Note:	Some optional features must be purchased for an additional fee.

Some additional features of DonorPerfect Online are:

- **Calculated Fields:** This screen allows you to perform calculations that would be difficult to do by other means, and write the results to a specified field. For instance, you can calculate "When was the most recent pledge payment from each donor?" For details, see Using Calculated Fields in the SofterWare Knowledgebase.
- **Batch Entry:** The Batch Entry 2.0 screen allows you to enter gifts and pledges in batches. This speeds up data entry, reduces errors, and allows you to review the batch entries for correctness before posting them to the system. See Using Batch Entry 2.0 in the SofterWare Knowledgebase for details.
- **Data Import:** The Import 2.0 screen allows you to import a variety of different types of data into your system, including constituent records, transactions, codes and account information. See Using the Import 2.0 Module for details.
- **Moves Management:** The Moves Management screen 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. See Using the Moves Management Module for details.
- **Membership Support:** DonorPerfect Online can automatically award donors with varying levels of membership based on their level of giving, and can generate reports which outline the various membership levels currently awarded. See Membership Organization Support for details.
- **Events Management:** Organizations that hold fundraising events can use this feature to set up their events in DonorPerfect Online, track responses from potential attendees, and monitor the status of the event using a suite of specially tailored reports. See DonorPerfect Online Events Management for details.
- **Constant Contact Email:** The Constant Contact Email module provides a new level of integration between Constant Contact and DonorPerfect Online. Contacts from the Constant Contact website can be turned into constituent records. Mailing lists can be generated from DonorPerfect Online and used to send out email campaigns from Constant Contact. DonorPerfect Online contact

records are created for each email you send from Constant Contact, and updated as the email status changes. You can track the results of your campaigns from either DonorPerfect Online or Constant Contact. See Constant Contact Email for details.

- **Multi-Currency Tracking:** This feature allows you to enter donations in currencies other than the US dollar. You can also generate reports that list values in other currencies. For details, see Using Multi-Currency Tracking.
- **SmartActions:** 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. See Using the SmartActions Module for details.
- **Payment Processing:** DonorPerfect provides users with several different options for processing credit card and electronic bank draft transactions:
  - The Insta-Charge module provides an easy way for users to process one-time payments directly from within the application, instead of through a standard retail credit card terminal or a separate software application.
  - The EZ-EFT module allows you to process preauthorized recurring transactions. This requires donors to have authorized automatic payment for tuition or other expenses as part of a regular collection cycle.

  For details on payment processing, see the DonorPerfect Online Payment Processing Manual.