Getting Started Guide

DonorPerfect

SofterWare, Inc.

DonorPerfect Version 10

March 2010

Table of Contents

1. Welcome to DonorPerfect

This section describes DonorPerfect and tells you about this *Getting Started Guide*.

What Is DonorPerfect?

DonorPerfect is a software tool that will help you manage information about donors, gifts, pledges, and more. It stores this information in a single *relational database*. Once the information has been entered, it never has to be entered again, and everybody in your organization uses the same up-to-date information.

Who This Guide Is For

This guide is for new DonorPerfect users who want to learn the basics of using DonorPerfect. It can also serve as an introduction to the Version 10 interface for DonorPerfect users who are updating from previous versions.

What This Guide Covers

This guide introduces you to DonorPerfect and steps you through functions you will likely use every day. It also describes other functions you will use less often--weekly, monthly, or yearly—and tells you where you can find instructions when you need them. A brief glossary is included as well.

How to Use This Guide

The best way to use this guide is to follow along in DonorPerfect as you read each section. You can use the example data included in many of the sections or your own “real” data. If you use the example data, remember that it will become a part of your database. It won’t cause any harm, and you can always delete it later.

Conventions

Throughout this guide, specific conventions are used to help you easily identify elements in the document.

Notes

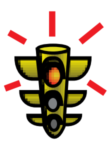
You may find any of the following types of notes in this manual. Each is represented by a unique icon for quick identification.

Definition: explanation of a term or concept to give you a better understanding of DonorPerfect

Note: additional information that is helpful to understand or be aware of when dealing with a specific concept or procedure

Important Note: important information that is necessary to understand or be aware of when dealing with a specific concept or procedure

Tip: helpful, often timesaving, advice to get the most out of the system



Warning: critical information that may prevent you from damaging your data

Every procedure in the manual that requires you to perform a certain number of steps in DonorPerfect begins with a heading that's preceded by a right arrow ►. Each system feature that you are required to click or access is in **bold** in the instructions.

2. Getting Acquainted with DonorPerfect

This section shows you how to start DonorPerfect and describes the first screen you will see, the **Welcome** screen. It also tells you about the many ways you can get help as you learn DonorPerfect.

Starting DonorPerfect

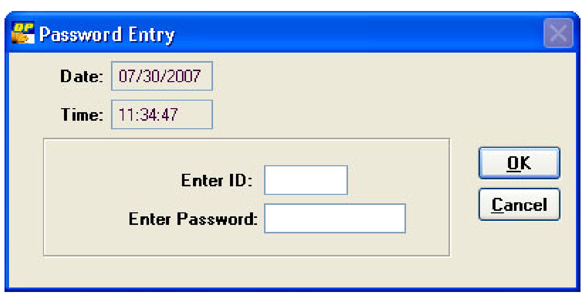
Depending on how DonorPerfect was installed, you may see a DonorPerfect icon on your desktop. You can start DonorPerfect from this icon or from the Windows **Start** menu.

To start DonorPerfect

1. Do one of the following:
   - Double-click the **DonorPerfect** icon.

     -OR-

   - From the Windows **Start** menu, select **All Programs**, then **DonorPerfect**, and then click **DonorPerfect** .
2. If the **Password Entry** screen appears, enter your user ID and password, then click **OK**.



3. If any messages appear, read them and respond by clicking the appropriate button.

> Tip: These messages provide important status information and enable you to take immediate action to keep your data accurate and up to date. For example, at the beginning of each fiscal and calendar year, the fields that DonorPerfect normally calculates automatically need to be recalculated to update the year-to-date totals. The first time you log into DonorPerfect in any new fiscal or calendar year, you will see a message that notifies you of the need to recalculate and enables you to run the recalculation immediately by clicking the Yes button. (For more information about this message, see "Recalculating Information in DonorPerfect" in the *DonorPerfect Administrator's Guide*.)

The DonorPerfect Welcome screen appears.

Don't be alarmed if your screen looks different. The Welcome screen, like many other DonorPerfect screens, can be customized.

Getting Help with DonorPerfect

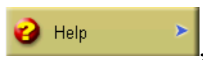
The fastest and easiest way to become productive with DonorPerfect is to take advantage of the online help, training, support, and documentation SofterWare makes available to you.

Online Help

Online help provides quick, easy-to-access information while you're using DonorPerfect.

▶ To access online help

Do one of the following:

- Press **F1** on your keyboard.
- From the **Help** menu, click **Help**.
- Click the **Help** button 

, and then select **Help**.

▶ To use online help

Once you're in the help system, click any of the following tabs to find the information you need:

- **Contents:** shows you the Table of Contents for the help. The DonorPerfect help is organized into chapters (represented as books) and topics. Double-click a book to see a list of topics in that chapter, then double-click the topic you want to read.
- **Index:** lists the keywords associated with each topic in the system. To search for a topic, enter a word or phrase in the blank field. Double-click on a keyword to access the topic associated with it.
- **Search:** allows you to search the topics in help for any word or phrase that you enter. Topics that match the search words you enter appear on the lower portion of the Search tab. To access a topic, double-click on it.

Note:	We are always looking for suggestions on how to improve our documentation, online help, and software! If you want to submit a suggestion, feel free to use the Suggestion Form accessible in the Clients Only section of our website.

Support

There may be times when you need an expert for one-on-one assistance, and we want to help. If you haven't already signed up for support and would like to find out about the different support plan options available to you, call **800-848-3279** or go to http://www.donorperfect.com/services/supportplans.asp. If you've already signed up for a full or premium support plan, read on for some tips on how to get the quickest, most effective support.

Designate a support contact

In order to provide the best support, we encourage you to identify one person in your organization as your primary contact for DonorPerfect Support. This would be the person who has the most knowledge of the DonorPerfect system. In their absence, we will always work with an alternate contact.

Before you call

Be ready to explain:

- What you want to do
- If you've already attempted the task:
  - What you did
  - What happened
  - What you thought was going to happen
- When you last made a backup of your data files

If an error message appears, write down the first error message (all other error messages are a product of the first error) and what you were doing. If you have this information handy, we are best able to quickly ascertain the nature of the problem.

When you call

PLEASE, if possible, be sitting at the computer. It is much easier to work with you on the phone if you can reach the computer.

You will be asked for your:

- Organization name and Client ID (You can find your Client ID by clicking the **Help** button and then selecting **Help About.**)
- Name
- Telephone number

If for some reason you're unable to reach a support person, please leave a message and be sure to provide your **extension** and the **best times to call**. We will provide you with a quick and accurate response to your problem or concern. Our goal is that you should always be able to reach a support person when you call. However, sometimes the volume of calls requires us to route your call to our voice mail system. By leaving us a detailed message, you will help us to call you back sooner and be better prepared to answer your question or resolve your problem.

Support hours

Our standard support hours are **Monday-Friday 8:30 A.M. - 8:00 P.M. Eastern Time.** If you need assistance during off-hours, try calling. If we're not available, leave your organization name, your name, Client ID, and phone number on our voice mail, and we'll call you back as soon as possible. Clients with premium support may enter an access code to receive off-hours support.

Contact options

Phone	Support: 215-628-4343* *800 number available with premium support
FAX	215-542-4370
Email	support@donorperfect.com
Website	http://www.donorperfect.com Click the Clients button and log in with your email address and Client ID. Then click Request Support, complete the Contact Support Form, and click Submit.

Training

Training is often the best way to learn a new system, and DonorPerfect is no exception. Several options are available to meet each client's individual needs and budget.

- **Webinars:** instructor-led virtual classes via the Internet
- **Regional classes:** hands-on classes scheduled around the country throughout the year
- **On-site training:** one-on-one training at your site for just your staff
- **Virtual on-site training:** training via remote desktop sharing and telephone

For detailed descriptions of these training options, or to register online for webinars or regional classes, see http://www.donorperfect.com/services/training.asp.

If you have questions concerning any of the training options or wish to schedule training, call 1-888-220-8111 or email training@ softerware.com.

Manuals and Other Documentation

The following additional documentation is available electronically:

- **DonorPerfect Installation Guide**: steps you through the installation process.
- **DonorPerfect Getting Started Guide** (this document): provides a tutorial introduction to DonorPerfect, walking you through the tasks most organizations use every day. If you're new to DonorPerfect, this is the place to start.
- **DonorPerfect User Guide**: explains how to use all of DonorPerfect's fundraising-management tasks in detail (except reporting).
- **DonorPerfect Reports**: describes all of the reports you can produce with DonorPerfect and explains how to generate them.
- **DonorPerfect Administrator's Guide**: explains how to set up DonorPerfect security; maintain your DonorPerfect system; and customize DonorPerfect screens, tables, and reports.

You can download these documents from the Clients Only section of the DonorPerfect website or order printed copies of the manuals. In addition, the DonorPerfect online Document Library includes many other documents that supplement the manuals and will help you get the most from your DonorPerfect system. SofterWare continues to update and augment the Document Library, so check in frequently.

▶ To obtain a document from the Document Library

1. Go to the **DonorPerfect** website at http://www.donorperfect.com.
2. Click the **Clients** button 

.
3. To log in, type your email address and Client ID, then click the **Login** button.
4. Click Document Library.
5. Locate the document you're interested in and click **View**.
6. To save a copy of the document to your computer, click the **File** menu, then **Save As**. Then select the folder where you want to save the document, change the file name if you wish, and click **Save**.

> Note: The documents in the Document Library are in PDF format. You must have Adobe Acrobat Reader to view them. We recommend you use version 8 or higher to take advantage of Reader's newest features. You can get the latest version for free at http://www.adobe.com/.

3. Managing Donor Information

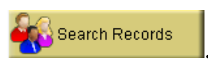
Because donors are the lifeblood of your organization, you need to effectively manage the information you have about them—their contact information, the gifts they give, their pledges, and pledge payments. The following sections will show you how to perform these critical everyday tasks.

> **Important!** Follow these sections in order. It is especially important that you start by finding the donor whose information you want to work with. If you can't find the donor, you will need to add them to the database before you do anything else.

Searching for Donors

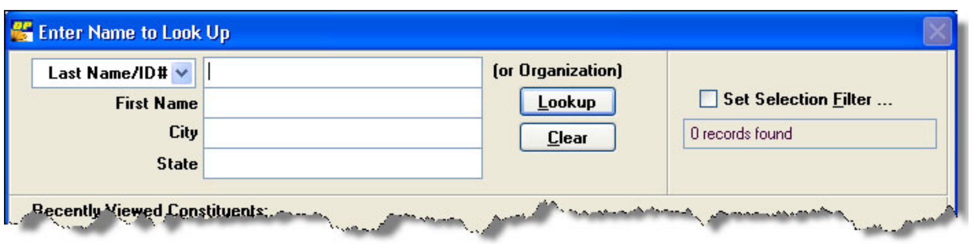
When new information comes across your desk—a gift, a pledge, a change to a donor's contact information, etc.—the first thing you need to do is see if the DonorPerfect database contains a record for the donor.

▶ To search for a donor record

1. Click the **Search Records** button 

.

   The **Enter Name to Look Up** screen appears.



2. In the **Last Name/ID#** field, type the first few letters of the person's or organization's name.

> **Tip:** Typing just the first few letters of the name will give you a list of names that you can scan to make sure you don't add a duplicate record to your database.

3. If you have a large database and want to narrow your search, do any of the following:

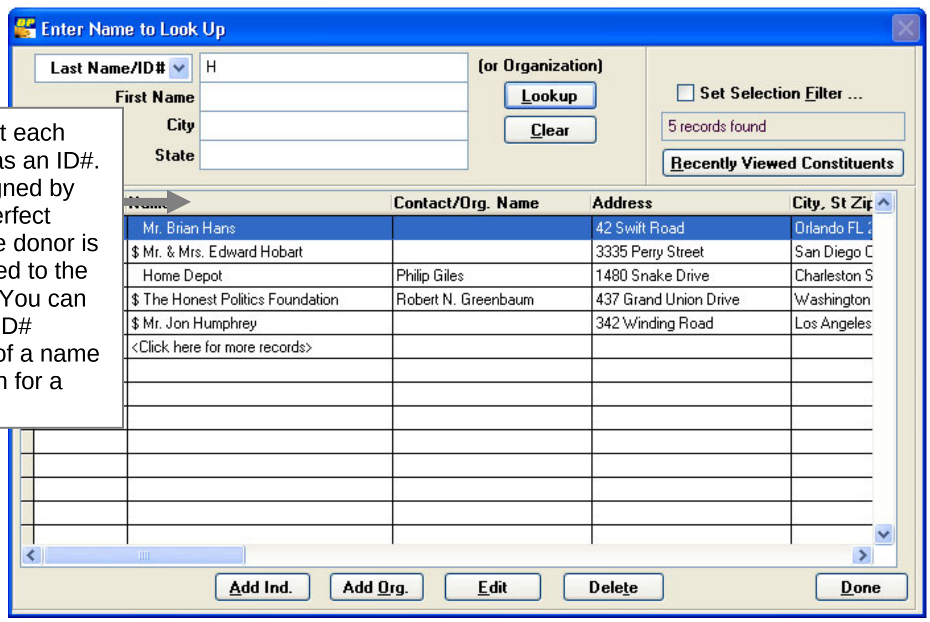
   - In the **First Name** field, type the person's first name (if you're looking for a person).
   - In the **City** field, type the name of the city where the person or organization is located.

- In the **State** field, type the state where the person or organization is located.
- Click **Set Selection Filter**, double-click a row that contains a selection filter that would be useful for narrowing your search, and then click **OK**.

> *What is a selection filter?* A selection filter narrows your search to records that share one or more characteristics. For example, a Board Members filter would limit your search to just those donors who are board members. (Because selection filters are specific to each organization and can be modified, you may or may not see the Board Members filter in your list.)

4. Click the **Lookup** button.

   The search results appear at the bottom of the **Enter Name to Look Up** screen.

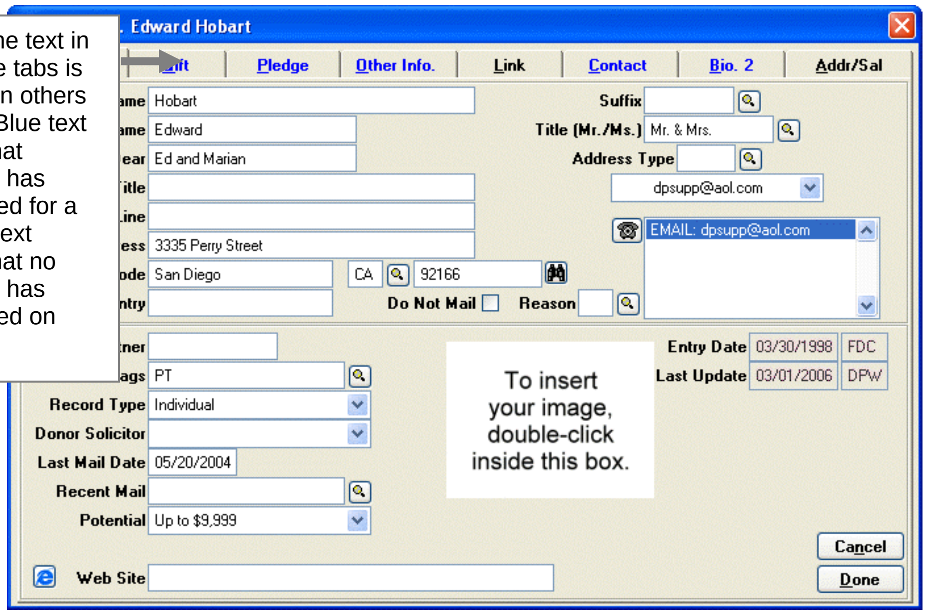


Note that each donor has an ID#. It's assigned by DonorPerfect when the donor is first added to the system. You can use the ID# instead of a name to search for a donor.

5. If the person or organization you're looking for is listed, double-click in the row that contains their name.

   The donor's information is displayed on the **Main** tab. You can now proceed to enter information. Later in this guide, you will learn how to add gifts and pledges. Of course if you just need to change some contact information for a donor, you can do it right here on the **Main** tab, and then click **Done** when you're finished.

Note that the text in some of the tabs is blue while in others it is black. Blue text indicates that information has been entered for a tab. Black text indicates that no information has been entered on that tab.



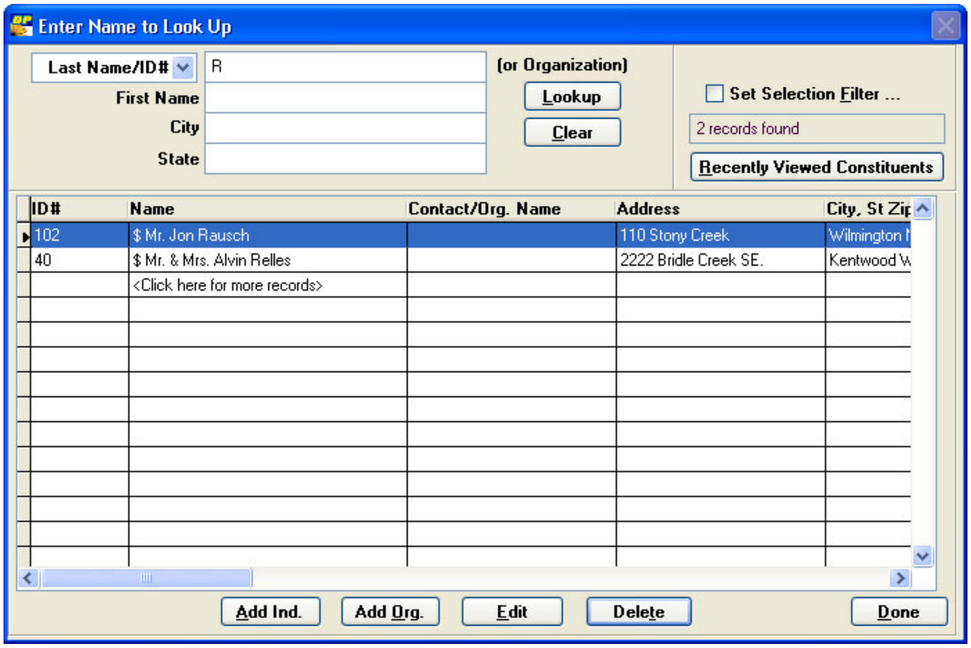
6. If the person or organization you're looking for is **not** listed, go to the next section to learn how to add a donor.

Adding Donors

When you want to enter information for a donor but don't find them listed when you search the database, you will need to add a new donor record to the database.

Example

Let's say you need to enter some information for a donor by the name of *Elizabeth Reynolds*. You start by searching for R and get the following results. There is no listing for *Reynolds*, so you will have to add a donor record for *Reynolds*.

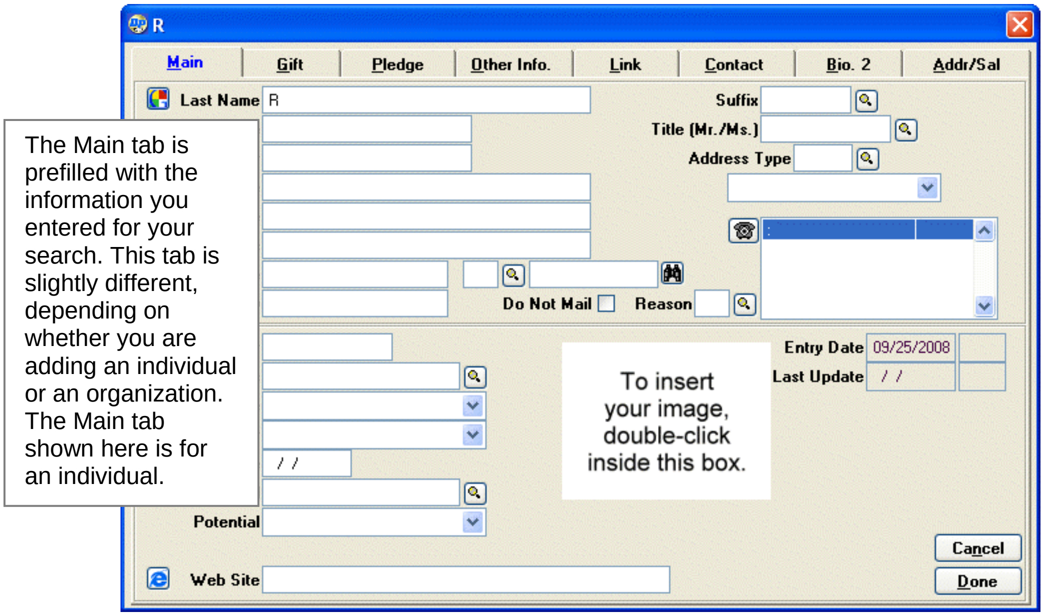


▶ To add a donor record

1. Do one of the following.

   - If you're adding a record for an individual donor, click the **Add Ind.** button.
   - If you're adding a record for an organization or company donor, click the **Add Org.** button.

The **Main** tab is displayed.



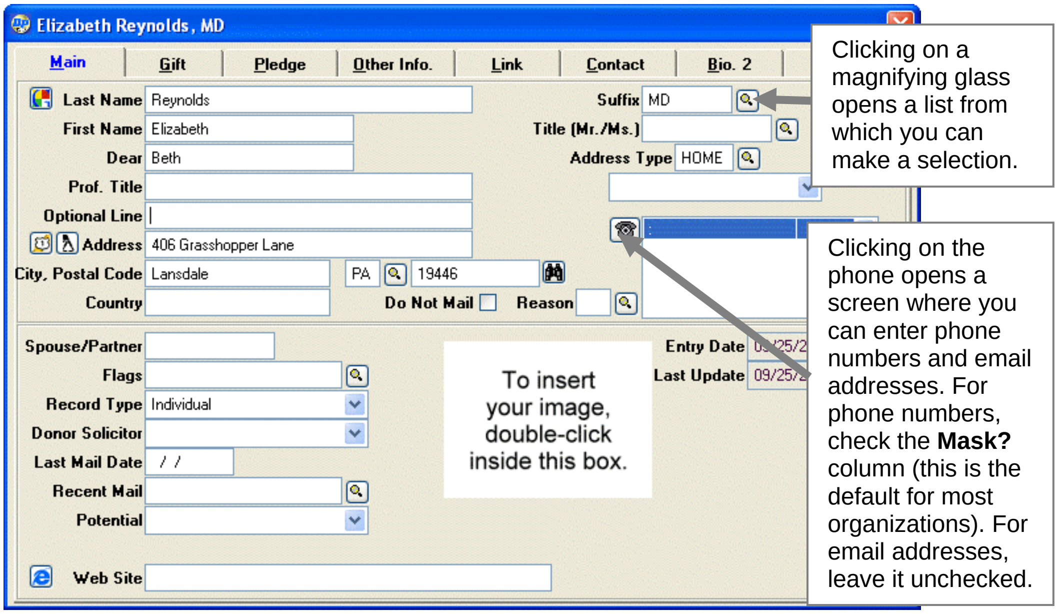
2. Enter the information you have for the donor in the fields on the **Main** tab. Use the TAB key to move from field to field.

Some Important Fields on the Main Tab for Individual Donors	
Last Name	Donor's last name.
First Name	Donor's first name.
Title (Mr./Mrs.)	Donor's title (e.g., Mr., Ms.).
Dear	Sometimes called the salutation, this is how the donor will be addressed in a letter after the *Dear*. If you leave this field blank, it will default to Title + Last Name; however, if Title is blank, it will default to First Name.
Address Type	A further identification of the address (e.g., HOME or WORK), in case you need to track more than one address for the donor.
Optional Line	An additional address line. It could be a spouse with a different last name or the name of a business when mailing to the person's work address.
City, ST, Zip	If you enter the zip code first, the city and state will be filled in automatically.
Do Not Mail	When checked, the donor will **not** be included in labels, listings, or regular mail merges unless an override is applied at run time.
Reason	The reason to not send mail (e.g., at donor's request).

(For more information about the fields on the **Main** tab, see the online help or the *DonorPerfect User Guide*.)

Example

Here's what the screen looks like for our new donor, Elizabeth Reynolds.



3. When you're finished entering information on the Main tab, do one of the following:

- To enter additional information associated with the same donor, click the tab that designates the type of information you want to enter. For example, if you wanted to add information about a gift from the donor, you would click the Gift tab, or if you wanted to add information about a pledge, you would click the Pledge tab. The next two sections in this guide explain how to add gifts and pledges.
- To save the information and return to the **Enter Name to Lookup** screen, click the **Done** button.

Adding Gifts

When you get a gift from a donor—whether it be cash, a check, stock, or something else—you need to add it to the database in order to track it and properly thank the donor.

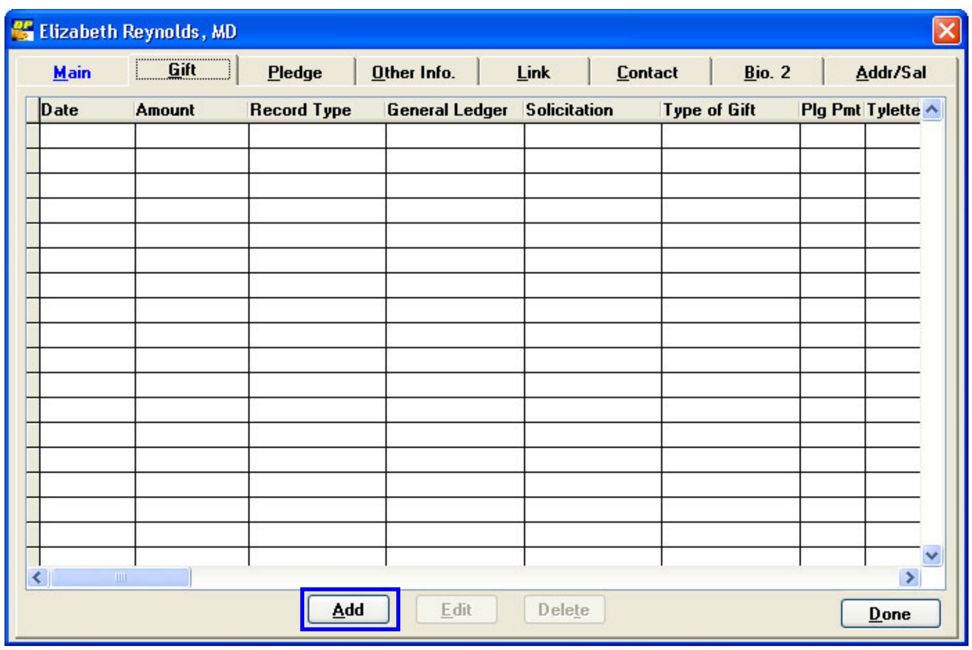
▶ To add a gift

1. Find the donor record for which you want to add a gift (see "Searching for Donors" on page 12), or add a new donor record if one doesn't already exist (see "Adding Donors" on page 15).
2. Click the **Gift** tab.

   -OR-

   Type **ALT + G** on your keyboard.

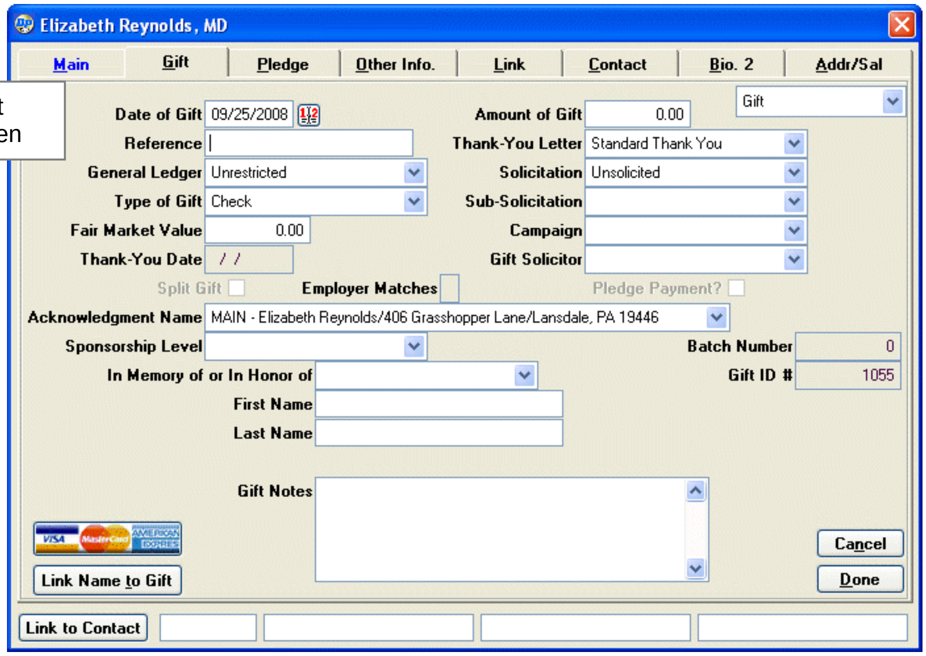
   The initial **Gift Lookup** screen appears. Any gifts already entered for the donor will be listed here.



3. Click the **Add** button.

The default **Gift Entry** screen appears. It is prefilled with information about the donor, plus any defaults your organization may have set up.

Default Gift Entry Screen



4. Enter the information you have about the gift.

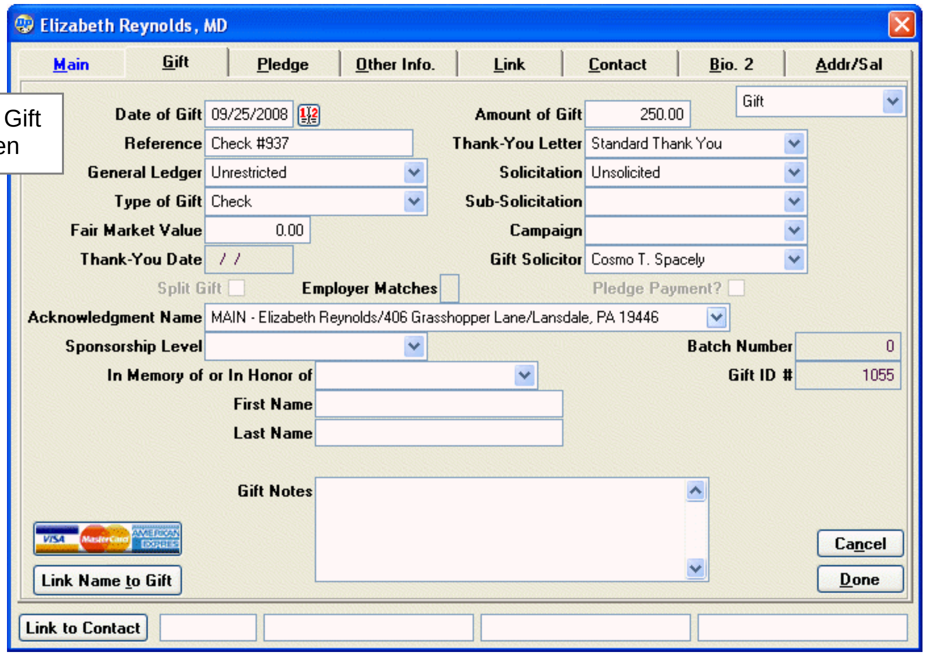
Some Important Fields on the Gift Entry Screen	
Date of Gift	Defaults to the current date but you can change it; often represents the check or entry date.
Reference	A notation to indicate how payment was made, e.g., a check number or last four digits of a credit card.
Thank-You Letter	The specific thank-you letter the donor should receive for this gift. For tracking purposes, you should assign a thank-you letter even if you don't plan to send one, for example, No TY Letter (to send) or #99.
General Ledger	The account or fund name to which the gift is to be credited.
Solicitation	The specific solicitation or appeal that brought in the gift.
Type of Gift	The form of payment, e.g., check, credit card, cash.
Gift Solicitor	The person in your organization credited with bringing in the gift.

(For more information about the fields on the Gift tab, see the online help or the *DonorPerfect User Guide*.)

Example

Here's the gift information we've filled in for Elizabeth Reynolds. It shows that her gift was for $250 and was paid by check number 937. The gift was brought in by Cosmo T. Spacely at the 2007 Banquet and will be credited to the Unrestricted account. Elizabeth will receive the Standard Thank-You letter.

Completed Gift Entry Screen



5. When you're finished entering gift information, do one of the following:

- To enter additional information associated with the same donor, click the tab that designates the type of information you want to enter. (If you want to enter another gift for the same donor, click the **Gift** tab.)
- To save the information and return to the Enter Name to Lookup screen, click the **Done** button.

Adding Pledges

A pledge is a promise of a gift to be given at a later date or over a specified period of time. When you receive a pledge, you need to add it to the database, just as you do with gifts. And luckily, adding a pledge is a lot like adding a gift.

▶ To add a pledge

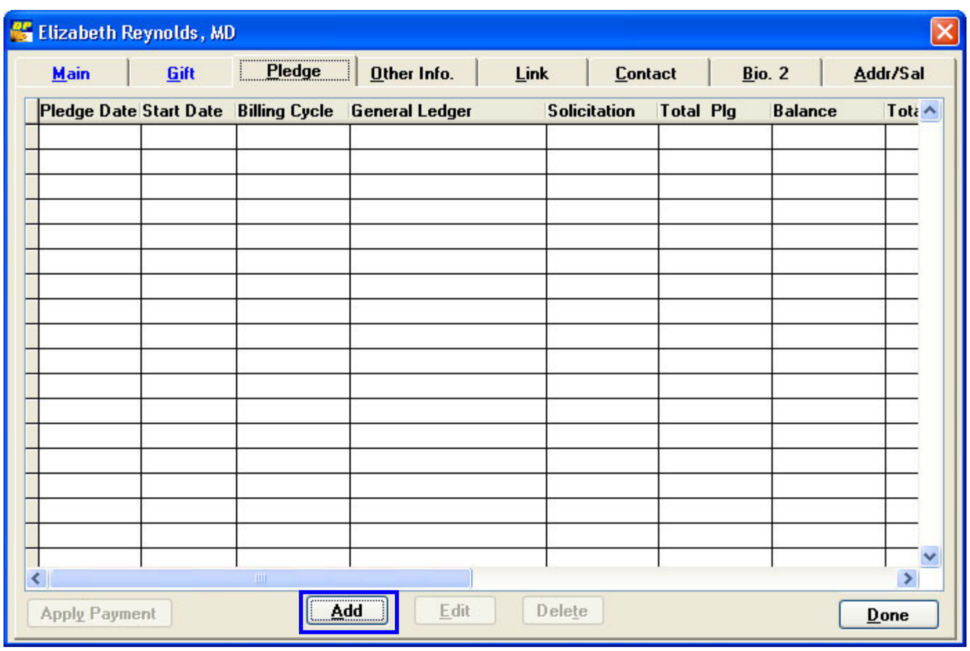
1. Find the donor record for which you want to add a pledge (see “Searching for Donors” on page 12), or add a new donor record if one doesn’t already exist (see “Adding Donors” on page 15).
2. Click the **Pledge** tab.

   -OR-

   Type **ALT + P** on your keyboard.

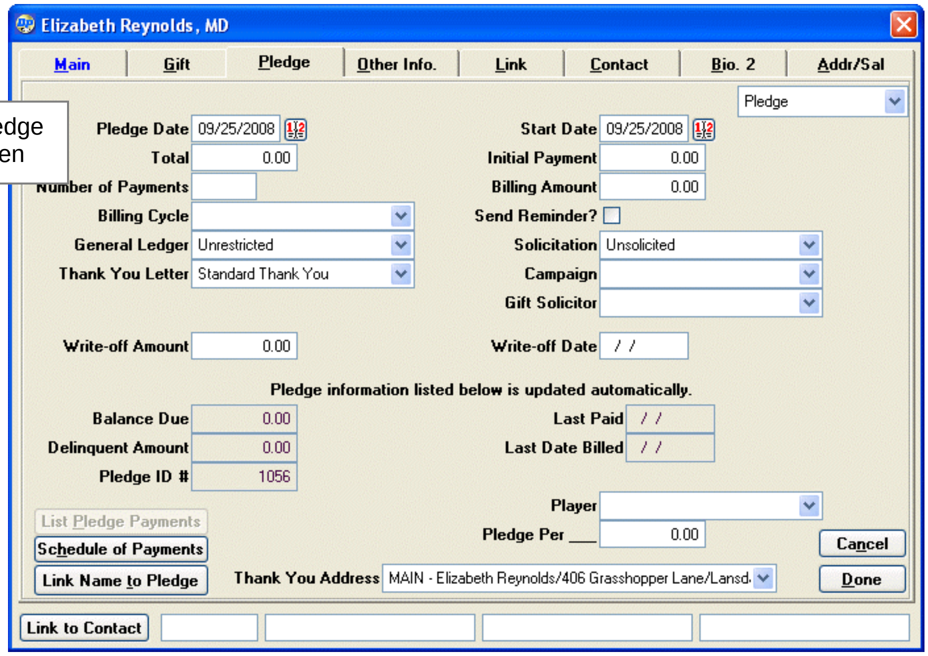
   The initial **Pledge Lookup** screen appears. Any pledges already entered for the donor will be listed here.

3. Click the **Add** button.

   The default **Pledge Entry** screen appears. It is prefilled with information about the donor, plus any defaults your organization may have set up.

Default Pledge Entry Screen



4. Enter the information you have about the pledge.

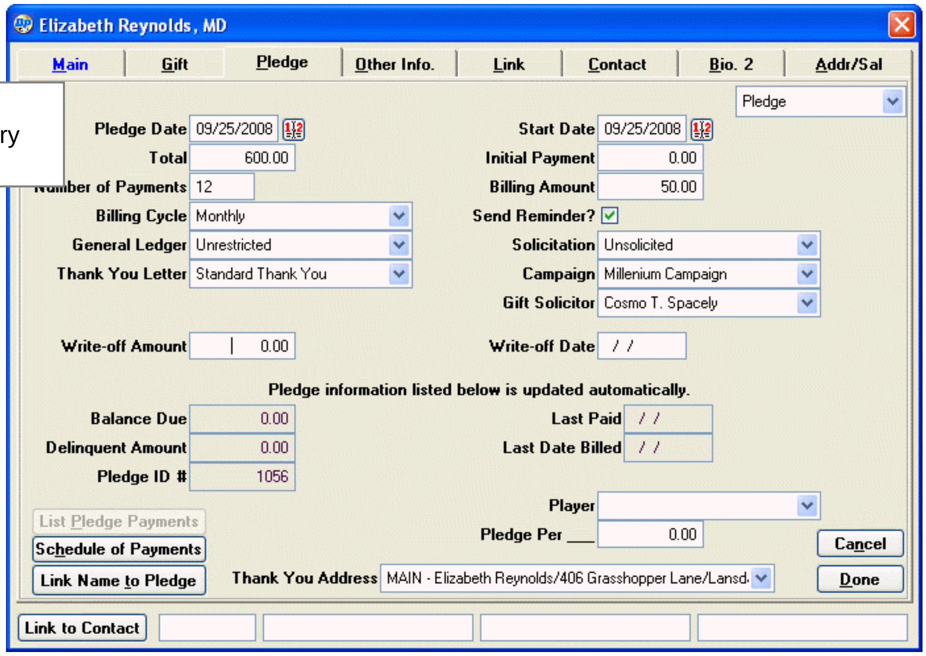
Some Important Fields on the Pledge Entry Screen	
Pledge Date	The date the donor made the pledge.
Start Date	The date the donor will start receiving pledge reminders.
Total	The total pledge amount to be paid over time.
Initial Payment	The amount paid at the time the pledge was made, if any.
Number of Payments	The total number of payments the donor will make. (This is an optional field, which does not exist in all systems.)
Billing Amount	The amount to be invoiced for each billing cycle. If the Total and Number of Payments fields are both filled in, this amount is calculated for you automatically.
Billing Cycle	How often the pledge is to be billed, e.g., monthly, quarterly, etc.
Send Reminder?	Must be checked to generate a pledge reminder during pledge processing.
General Ledger	Account or fund name where the pledge is to be credited.
Solicitation	The specific solicitation that brought in the pledge.
Thank-You Letter	The specific thank-you letter the donor should receive for this pledge. For tracking purposes, you should assign a thank-you letter even if you don't plan to send one, for example, No TY Letter (to send) or #99.
Gift Solicitor	The person in your organization credited with bringing in the pledge.

(For more information about the fields on the Pledge tab, see the online help or the *DonorPerfect User Guide*.)

Example

Elizabeth Reynolds pledged $600 to the building fund to be paid in 12 equal monthly installments beginning on August 1, 2007. She should receive the Capital Campaign Thank-You letter, plus reminders when her payments are due. Cosmos T. Spacely was responsible for bringing in her pledge during the 2007 Phonathon. The following screen shows the Pledge tab filled in with that information.

Completed Pledge Entry Screen



5. When you're finished entering information, do one of the following:

- To enter additional information associated with the same donor, click the tab that designates the type of information you want to enter. (If you want to enter another pledge for the same donor, click the **Pledge** tab.)
- To save the information and return to the Enter Name to Lookup screen, click the **Done** button.

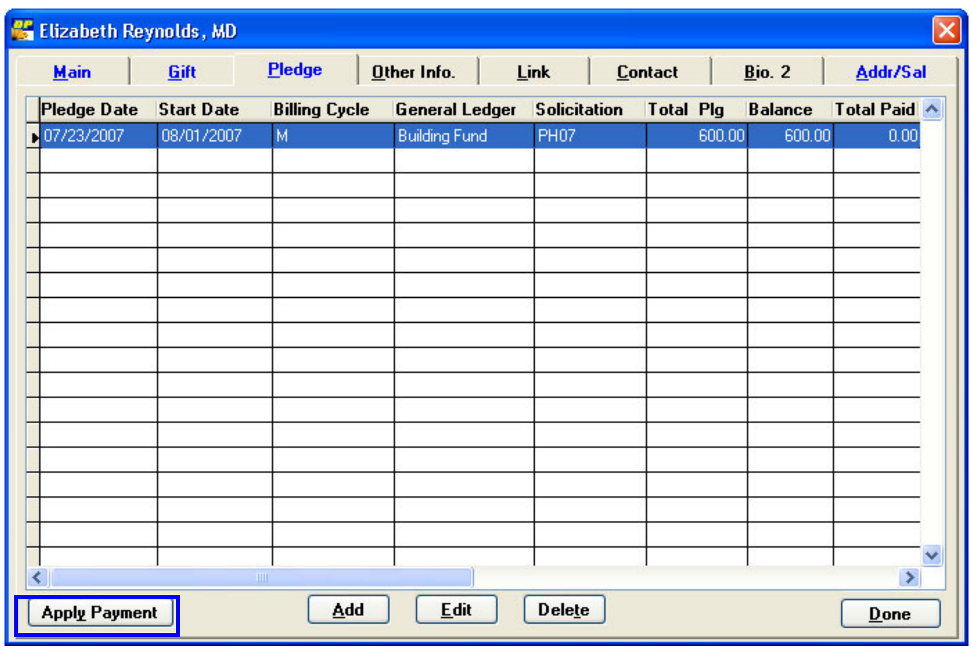
Applying Pledge Payments

When a pledge payment comes in, all you have to do is apply the payment to the donor's outstanding balance. DonorPerfect does all the math and recordkeeping for you.

▶ To apply a pledge payment

1. Find the donor record for which you want to add a pledge payment (see "Searching for Donors" on page 12), or add a new donor record if one doesn't already exist (see "Adding Donors" on page 15).
2. Click the **Pledge** tab.

The initial **Pledge Lookup** screen appears.

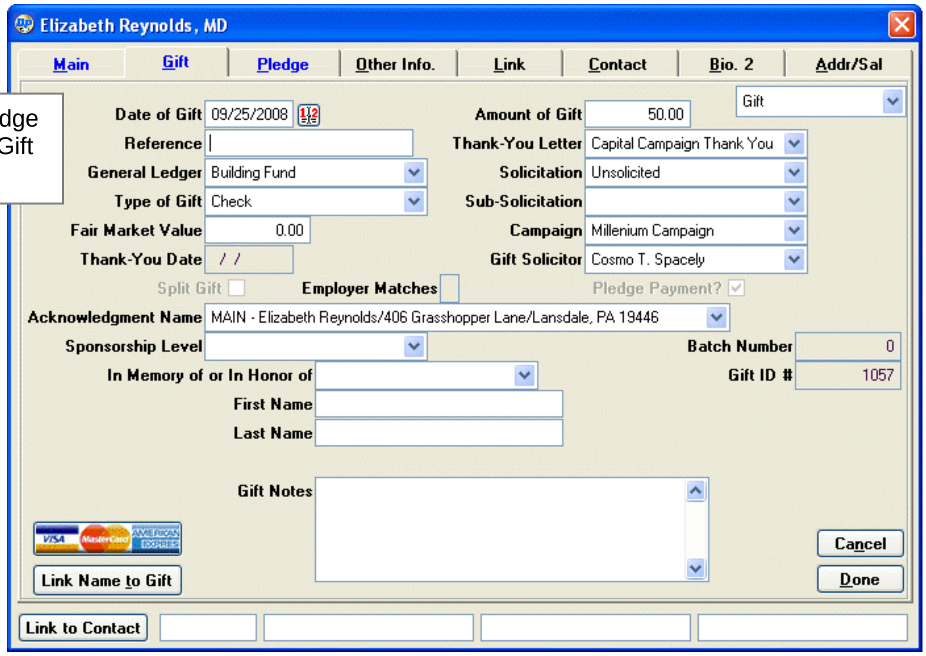


3. Highlight the pledge for which you want to apply a payment, and click the **Apply Payment** button.

   A message appears, telling you that you will be creating a pledge payment.
4. Click **OK**.

A **Gift** screen for that pledge payment is displayed. Much of the information is already filled in from information previously entered about the donor and pledge.

Default Pledge Payment / Gift Screen

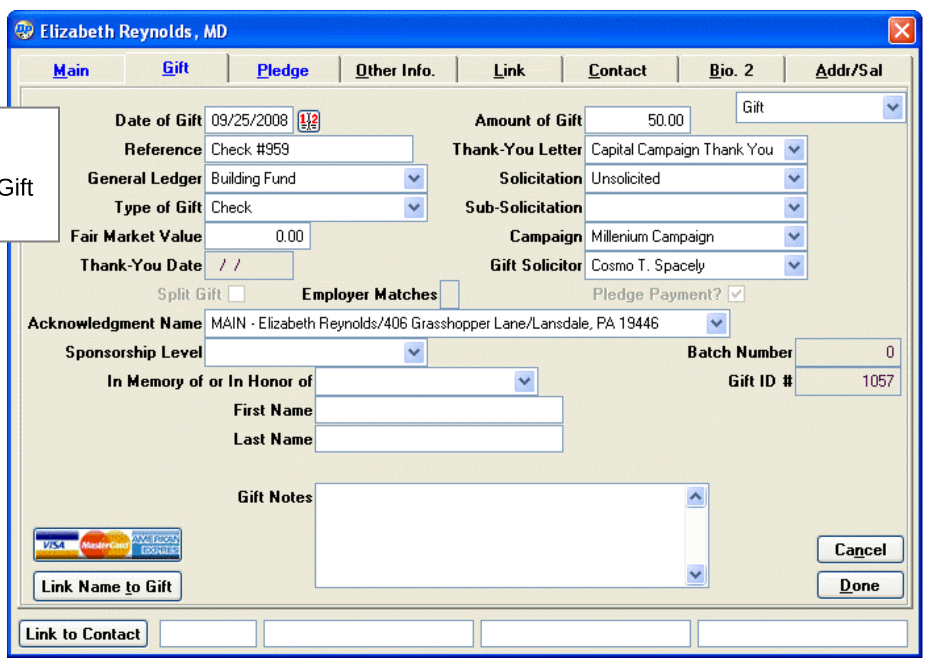


5. Edit the existing information or enter additional information, if needed.

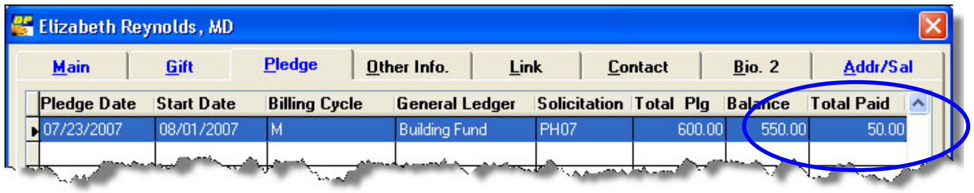
<u>Example</u>

Elizabeth Reynolds sent a $50.00 check for her first pledge payment on August 1, 2007. When you get to the Gift tab, all you have to do is enter the check number in the Reference field and make sure the other fields are filled in correctly.

Completed Pledge Payment / Gift Screen



When you go back to the **Pledge** tab for Elizabeth Reynolds, you see that the system applied the $50.00 payment to the pledge and updated the pledge balance to $550.



6. When you're finished entering information, do one of the following:

- To enter additional information associated with the same donor, click the tab that designates the type of information you want to enter.
- To save the information and return to the Enter Name to Lookup screen, click the **Done** button.

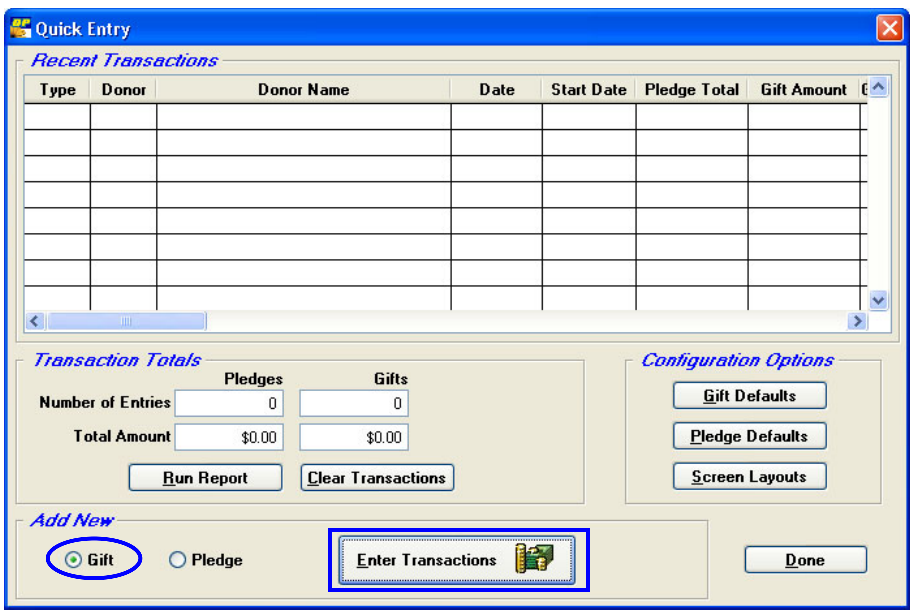
Using Quick Entry

The methods you've learned for entering gifts and pledges are convenient when you just have a few. But if you have a lot, **and** they're for existing donors, it's faster to use Quick Entry. With Quick Entry, you can quickly enter the information for all of the donors in one grid; you don't have to jump from one donor record to the next.

▶ To enter a gift with quick entry

1. On the main screen navigation bar, click the **Quick Gift Entry** button.

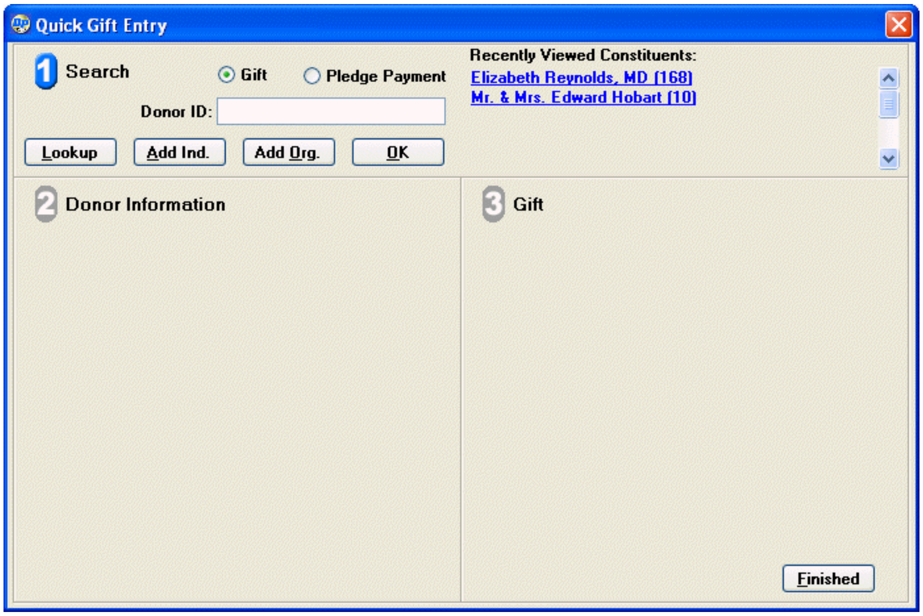
The **Quick Entry** screen appears.



Tip: If most of the gifts you're adding with Quick Entry have some information in common (e.g., they all go to the same general ledger fund and get the same kind of thank-you letter), you can save time by assigning gift defaults. Click the **Gift Defaults** button, enter the common information, then click **Done**.

2. Select **Gift**, then click the **Enter Transactions** button.

A blank **Quick Gift Entry** screen appears.

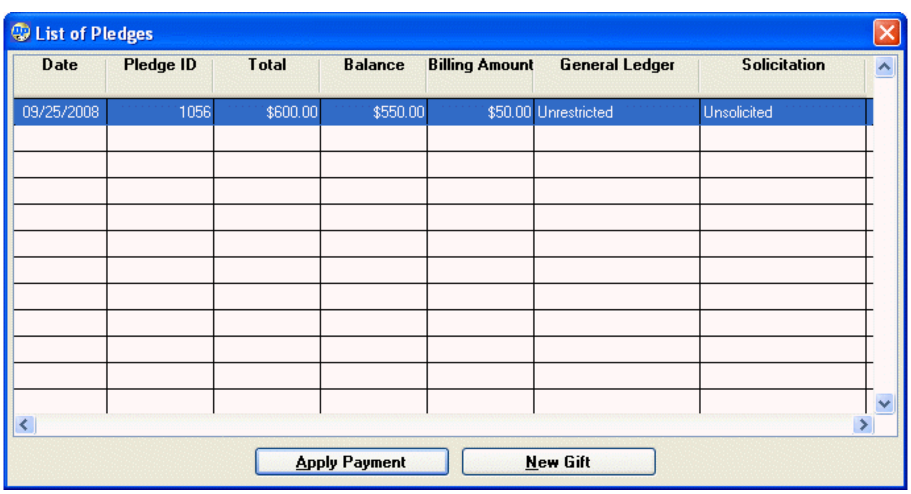


3. In section 1, type the donor's ID and click **OK**, or click the **Lookup** button and select the donor. (The **Lookup** button takes you to the familiar Enter Name to Lookup screen you learned how to use in the section on "Searching for Donors" on page 12.)

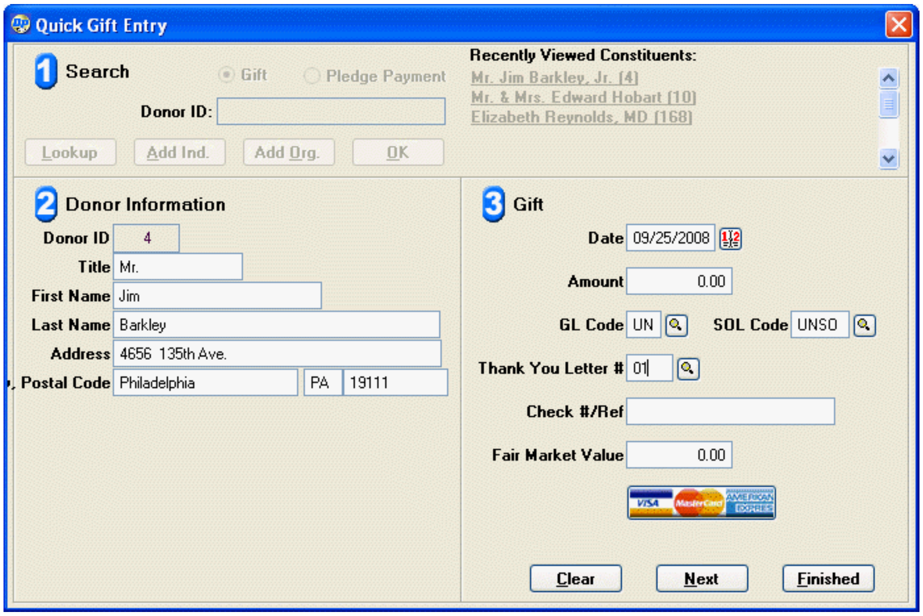
> **Tip:** Typing the donor's ID is the fastest way to complete this screen. When you send pledge cards or payment coupons to your donors, preprint them with the donor's ID, and you'll have it at your fingertips when it's time to do Quick Gift Entry.

One of the following screens appears:

- **List of Pledges Screen—**if the donor has any open pledges (go to step 4).

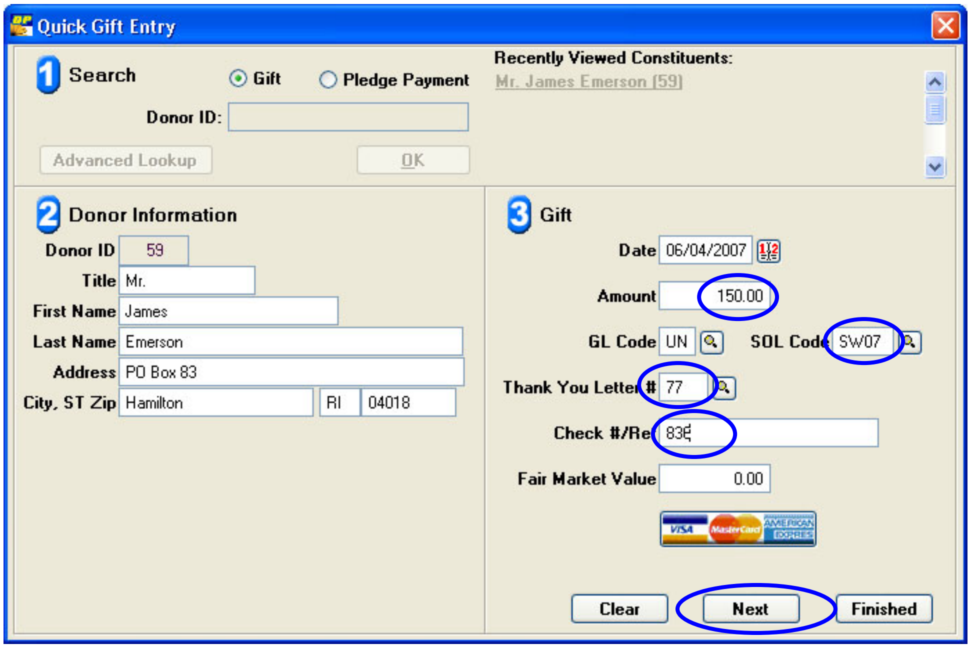


- **Partially Completed Quick Gift Entry Screen—**if the donor doesn't have any open pledges (go to step 6).



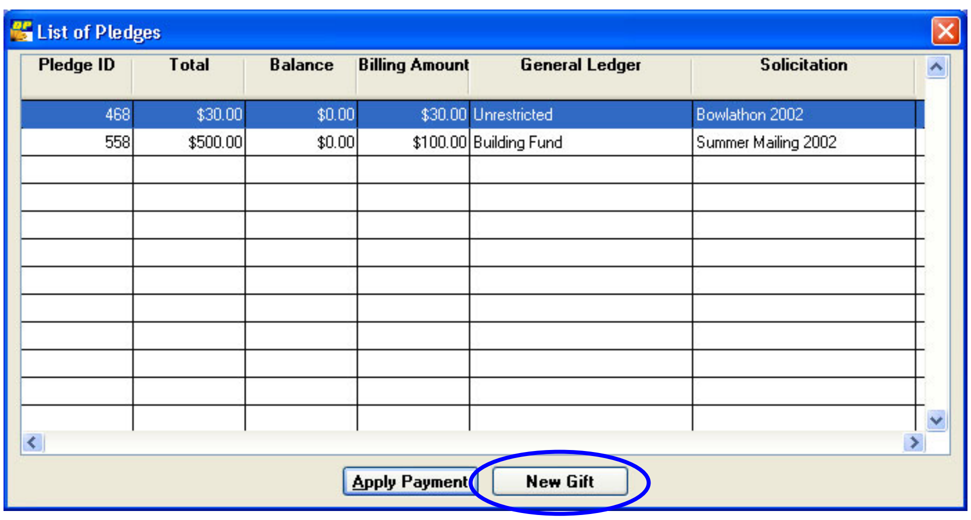
4. If the **List of Pledges** screen is displayed (top of this page), do one of the following:
   - To apply the gift to a pledge, highlight the pledge and click **Apply Payment**.
   - To enter the gift as a new gift (**not** to be applied to a pledge), click **New Gift**.
5. A partially completed **Quick Gift Entry** screen is displayed (above).
6. In section 2 of the **Quick Gift Entry** screen**,** review the donor information and revise if necessary.
7. In section 3 of the **Quick Gift Entry** screen, enter the gift information. (See the table on page 19 for information about the fields.)
8. To enter a gift for another donor, click the **Next** button and go to step 3, above.
9. When you're finished entering gifts, click the **Finished** button.

Example
You have a stack of checks from your Spring Walkathon. You think a lot of the donors are already in your database, so you decide to use Quick Gift Entry, because it will be faster. You click the **Quick Entry** button, select **Gift**, then click the **Enter Transactions** button. On the **Quick Gift Entry** screen that appears, you click **Advanced Lookup** to find the ID of the first donor, James Emerson. A partially completed **Quick Gift Entry** screen appears. You check the donor information and enter the gift information that isn't already filled in.

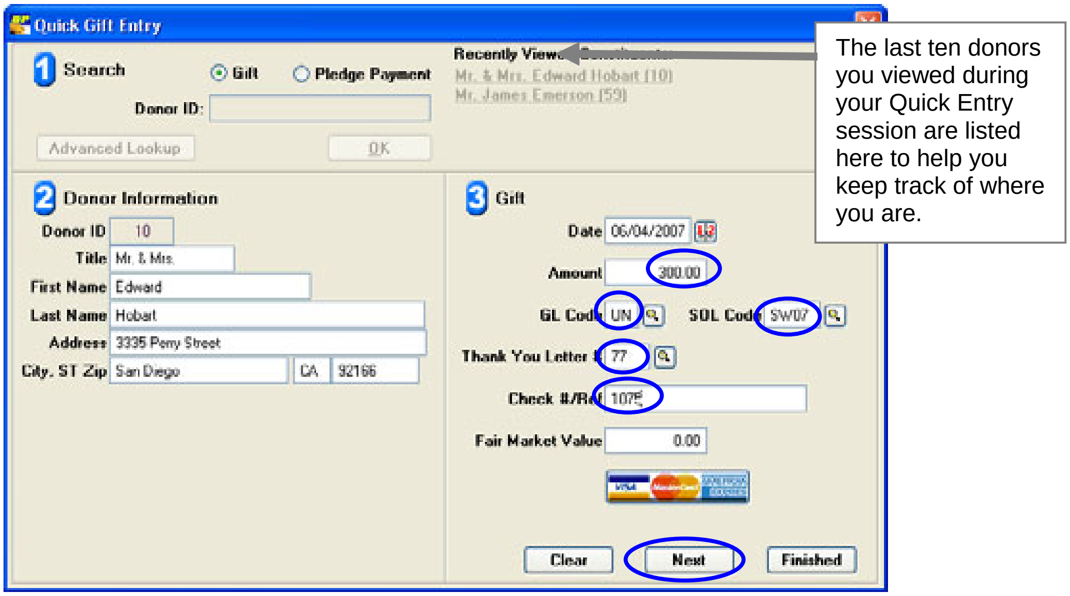


You then click the **Next** button and look up the next donor, Edward Hobart.

This time a **List of Pledges** appears, but you don't want to apply the gift to a pledge, so you click the **New Gift** button.



A partially completed **Quick Gift Entry** screen appears. You check the donor information and enter the gift information that isn't already filled in.



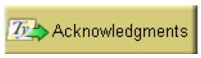
You quickly reach the last check in your stack of donations. You can't find the last person, Karin Tomlinson, when you do the lookup, so you click **Done**, **Finished**, and then **Done** to leave **Quick Entry**. You must add her donor information and gift information as described in "Adding Donors on page 15 and "Adding Gifts" on page 18.

Acknowledging Gifts and Pledges

After entering gift and pledge information into DonorPerfect, you'll want to thank the donors who gave to your organization. With DonorPerfect, you can take care of your thank-you letters in two easy steps. First, you'll review the gifts and pledges that have been entered into the system to make sure they are correct. Then, when you're satisfied, you'll create your thank-you letters.

▶ To start the acknowledgment process

1. On the main screen navigation bar, click the **Acknowledgments** button.



The Acknowledgment Processing screen appears.

Important!	Close any open merge documents before you begin acknowledgment processing, or you may encounter errors.

▶ To review gifts and pledges that have been entered

1. On the Acknowledgment Processing screen, click the Review Batch/Gift Reports button.

   The Acknowledgment Reports screen appears.

These fields are automatically entered by the system. The **Number of Gifts in Current Batch** is the total number of gifts entered since acknowledgments were last processed, and the **Current Batch Number** identifies that group of gifts.

2. In the **Select Transactions** section, choose one of the following:

   - **All Transactions**—To see all gifts and pledges entered into DonorPerfect since acknowledgments were last processed.
   - **My Transactions**—To see just the gifts and pledges that you entered into DonorPerfect since acknowledgments were last processed. This is based on the User ID you use to log in at the beginning of your DonorPerfect session.

3. In the **Select Report** section, choose the report format you want to use to review the gifts and pledges:

   - **Batch Listing**—Lists gifts entered since the last time acknowledgments were processed.
   - **GL Listing**—Lists gifts entered, by account or fund to which they are being credited, since the last time acknowledgments were processed.
   - **Created By Listing**—Lists gifts entered, by user ID of person who entered them, since the last time acknowledgments were processed.
   - **Thank-you Listing**—Lists gifts entered by thank-you letter to be sent (e.g., Standard Thank You, Capital Campaign), since the last time acknowledgments were processed.

4. Select either **Detail** to show detailed information for each gift and pledge or **Summary** to show subtotals for all gifts and pledges.

5. In the **Report Heading** field, type a heading for your report, if you wish.

6. To create the listing, either click **Preview** (to view it on your screen) or **Print** (to print it).

   The following is a sample detailed GL Listing.

07/27/2007 | Your Organization Name Here | Page: 1

GL Batch Listing for Current Batch

ID	Name	Type	Date	Solicitation		Amount	Reference
BF - Building Fund							
140	Elizabeth Reynolds, MD	CK	08/01/2007	PH07		50.00	Check #959
		BF - Building Fund			1	50.00	
UN - Unrestricted							
81	Mr. Red Grant	CK	07/27/2007	BQ07		400.00	263
102	Mr. Jon Rausch	CK	07/27/2007	BQ07		25.00	902
85	Mr. Jack Dunn	CK	06/20/2007	BQ07		400.00	2001
140	Elizabeth Reynolds, MD	CK	07/23/2007	BQ07		250.00	Check #937
		UN - Unrestricted			4	1,075.00	
					5	1,125.00	

Cash	0	0.00
Check	5	1,125.00
American	0	0.00
Visa	0	0.00
MasterCard	0	0.00
Insta-Charge	0	0.00
Discover	0	0.00
Other	0	0.00
TOTAL	5	1,125.00

Current batch: 42

7. Check the listing to make sure the correct thank-you letter number is assigned to each gift.

   - If there are errors, correct them and then repeat steps 1-7.
   - If there are no errors, you can proceed to create your thank-you letters. (See the following section.)

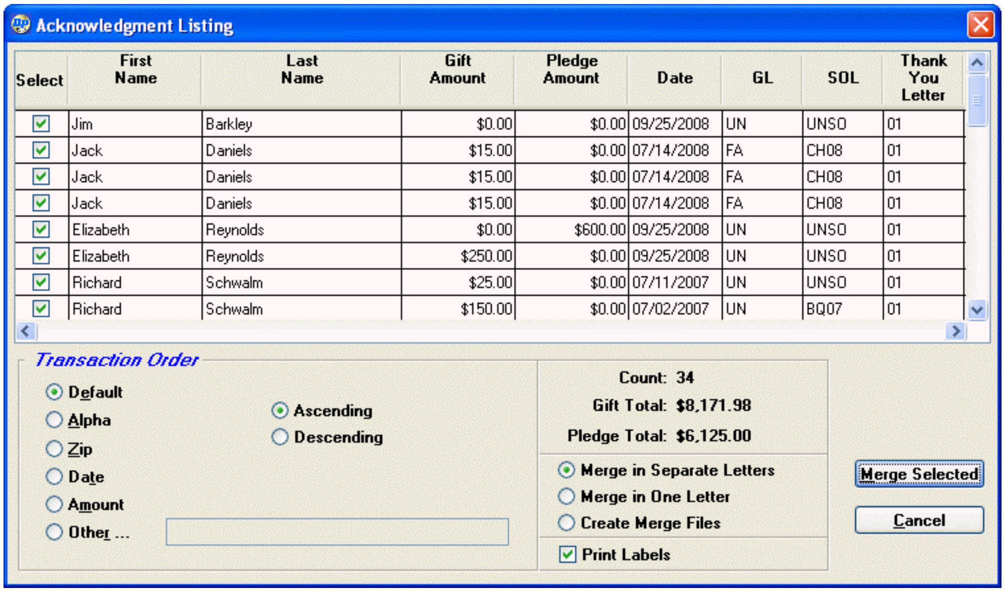
▶ To create thank-you letters

> **Tip:** Before you begin, make sure you have the files you need: a mail merge thank-you letter that you create in your word processor and a merge data file that you create in DonorPerfect. To create a mail merge thank-you letter, you can edit and save one of the sample mail merge thank-you letters included in your DonorPerfect folder (e.g., WPThanks.doc). These letters are preformatted with much of the appropriate merge information. When you use a thank-you letter for the first time, you'll need to create an accompanying merge data file for it. Select **Create Merge Files** and **Merge** on the **Acknowledgment Listing** (shown on the following page) to create it. For more information about creating merge data files, see the *DonorPerfect User Guide*.

1. Do one of the following:
   - From the **Acknowledgment Reports** screen, click the **Process TY's** button.
   - From the Acknowledgment Processing screen, click the Process Acknowledgments button.

   The Acknowledgment Processing screen appears.
2. Select one of the following:
   - **All Transactions**—To create thank-you letters for all gifts and pledges entered into DonorPerfect since acknowledgments were last processed.
   - **My Transactions**—To create thank-you letters for just the gifts and pledges **you** entered into DonorPerfect since acknowledgments were last processed.
3. Check the **Select** box to the left of each specific **Thank-You Letter** you want to create. (Checking the box immediately below the **Select** column heading checks all of the boxes.)
4. Click the **Process Selected** button.

An Acknowledgment Listing appears, showing donor information for each Thank-You Letter type you selected.



5. Select one of the following:

- **Merge in Separate Letters**—To create a separate file for each thank-you letter. Each letter will open separately.
- **Merge in One Letter**—To create a single file for all of the gifts and pledges. Use this option if you have set up one merge document to handle various types of gifts automatically.
- **Create Merge Files**—Use this option if you plan to merge the documents later, or do not use Microsoft Word, or are creating a new merge document and have not yet associated your form letter with its data source.

6. If you also want to print labels, check **Print Labels**.
7. Click **Merge Selected**.

Your thank-you letter(s) and labels (if you chose to print them) are displayed.

For more information on creating and processing merge letters, see “Creating Thank-You Letters” in the *DonorPerfect User Guide*.

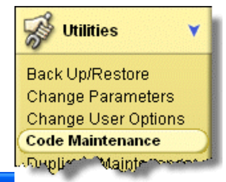
4. Setting Up DonorPerfect Codes

Some of the fields on DonorPerfect screens are *coded*. Codes are data entry shortcuts that ensure the consistency of your data.

Adding, Editing, and Inactivating Codes

You can quickly modify existing DonorPerfect codes, add new codes as the need arises, and inactivate codes you're no longer using. For example, you might want to create a special thank-you letter code for a new campaign, change the thank-you letter description that's displayed in picklists, or inactivate the code for a thank-you letter used for one of last year's campaigns.

▶ To add a code



1. Click the **Utilities** button, then click **Code Maintenance**.

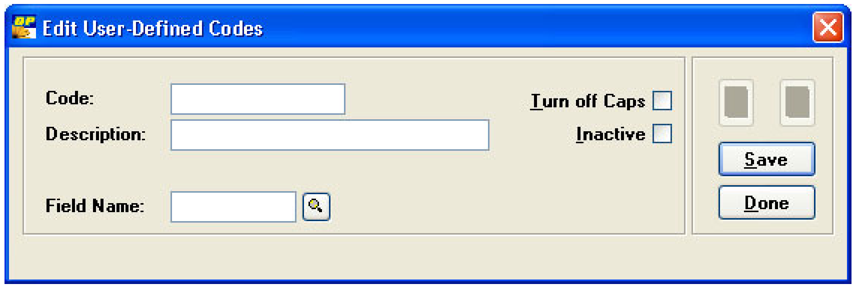
   The **Change Codes** screen appears.

Field	Code	Description	Inactive?	Cr_dt	Cr_by	Mod_dt
ACTIVITY	CD	Call DonorPerfect	N	01/01/2000	DPW	06/04/2007
ACTIVITY	CS	Sales: 800-220-8111	N	01/01/2000	DPW	01/01/2000
ACTIVITY	GP	Grant Proposal	N	01/01/2000	DPW	01/01/2000
ACTIVITY	GR	Grant Report	N	01/01/2000	DPW	01/01/2000
ACTIVITY	LT	Letter	N	01/01/2000	DPW	01/01/2000
ACTIVITY	MA	Mailing	N	01/01/2000	DPW	01/01/2000
ACTIVITY	ME	Meeting	N	01/01/2000	DPW	01/01/2000
ACTIVITY	TE	Telephone Call	N	01/01/2000	DPW	01/01/2000
ACTIVITY	VI	Visit	N	01/01/2000	DPW	01/01/2000
ACTIVITY	EM_IN	Email In	N	04/26/2007		/ /
ACTIVITY	EM_OUT	Email Out	N	04/26/2007		/ /
ADDTYPE	HOME	Home Address	N	01/01/2000	DPW	01/01/2000
ADDTYPE	VACA	Vacation Home	N	01/01/2000	DPW	05/23/2007
ADDTYPE	WORK	Work Address	N	01/01/2000	DPW	01/01/2000
ADDTYPE	VOLA	Volunteer Address	N	06/08/2005	DPW	03/01/2006
ASSIGNMENT	CHR	Chairperson	N	01/01/2000	DPW	01/01/2000
BYWHOM	CTS	Casey T. Stengel	N	01/01/2000	DPW	01/01/2000
BYWHOM	DPW	Donna P. Windars	N	01/01/2000	DPW	01/01/2000

2. Review the existing codes for the field. All codes for a particular field should be the same length. For example, if you're going to add a new TYLETTER code, and all existing TYLETTER codes are two characters, your new code should be two characters, as well.

3. Click **Add**.

A blank **Edit User-Defined Codes** screen appears.



4. In the **Code** field, enter the new code. This is what DonorPerfect uses to identify and process the data.
5. In the **Description** field, enter a description. This is what displays in reports and screens, and gives meaning to the code.
6. In the **Field Name** field, click the magnifying glass, then double-click the name of the field that this code belongs to. (Depending on the Field Name you select, additional fields may appear for you to complete.)
7. To add another code, click **Save** and go to step 4.
8. To exit, click **Done,** then click **Done** again.

Example

The Solicitation code for last year's event was coded FD07 for Fall Dinner 2007. So, you would use the same format for this year's event:

Code: FD08

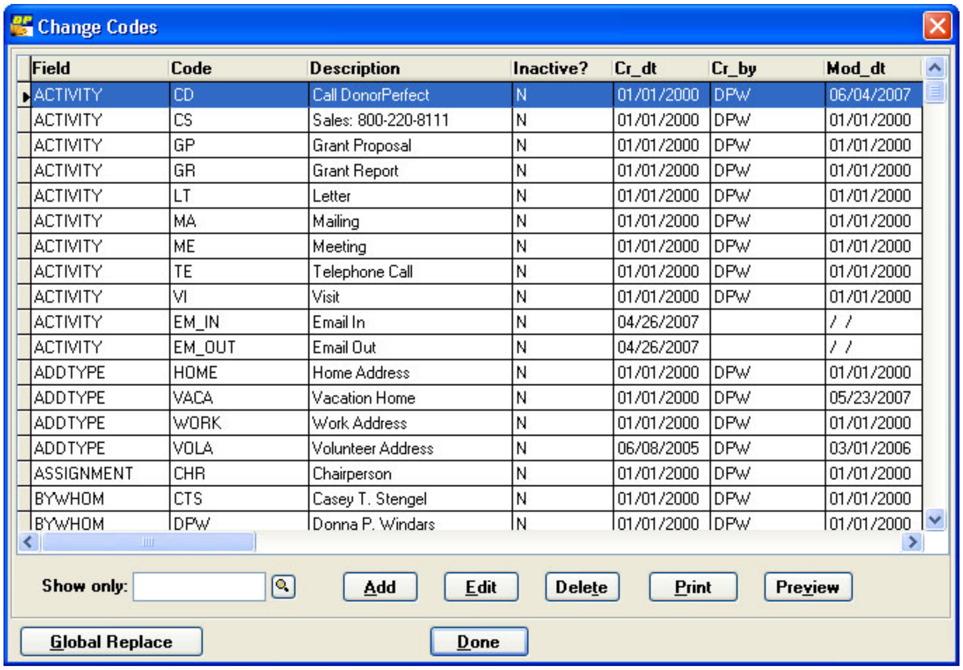
Description: Fall Dinner 2008

Field Name: SOL

▶ To edit a code

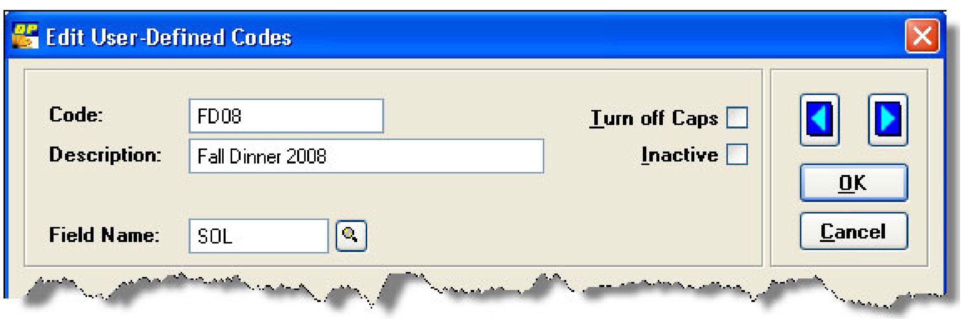
1. Click the **Utilities** button, then click **Code Maintenance**.

   The **Change Codes** screen appears.



2. Double-click the code you want to change.

   The **Edit User-Defined Codes** screen for that code appears.



3. Make your changes.

4. To edit another code, press the left-arrow button  or right-arrow button  to find the code and then make your changes.

5. To exit, click **OK**, then click **Done**.

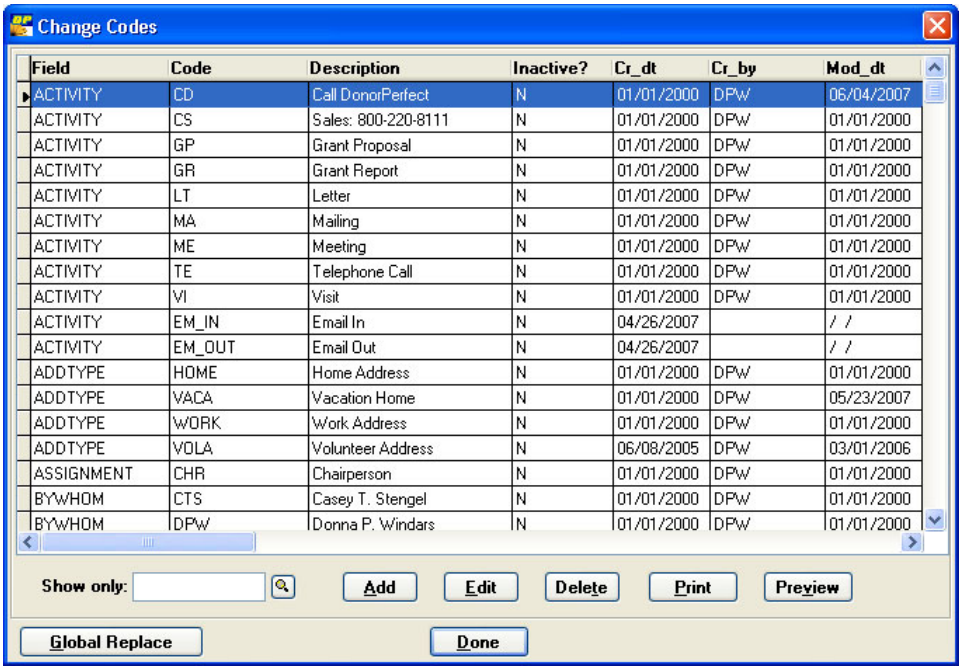
Example

After adding your Solicitation code, it is decided that the code description should appear as The Fall Gala of 2008 instead of Fall Dinner 2008.

▶ To inactivate a code

1. Click the **Utilities** button, then click **Code Maintenance**.

The **Change Codes** screen appears.

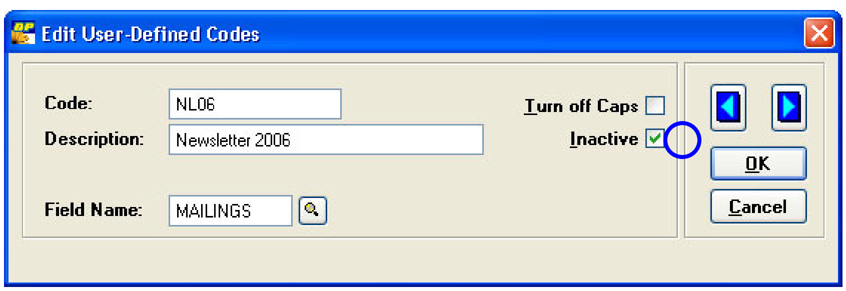


Field	Code	Description	Inactive?	Cr_dt	Cr_by	Mod_dt
ACTIVITY	CD	Call DonorPerfect	N	01/01/2000	DPW	06/04/2007
ACTIVITY	CS	Sales: 800-220-8111	N	01/01/2000	DPW	01/01/2000
ACTIVITY	GP	Grant Proposal	N	01/01/2000	DPW	01/01/2000
ACTIVITY	GR	Grant Report	N	01/01/2000	DPW	01/01/2000
ACTIVITY	LT	Letter	N	01/01/2000	DPW	01/01/2000
ACTIVITY	MA	Mailing	N	01/01/2000	DPW	01/01/2000
ACTIVITY	ME	Meeting	N	01/01/2000	DPW	01/01/2000
ACTIVITY	TE	Telephone Call	N	01/01/2000	DPW	01/01/2000
ACTIVITY	VI	Visit	N	01/01/2000	DPW	01/01/2000
ACTIVITY	EM_IN	Email In	N	04/26/2007		/ /
ACTIVITY	EM_OUT	Email Out	N	04/26/2007		/ /
ADDTYPE	HOME	Home Address	N	01/01/2000	DPW	01/01/2000
ADDTYPE	VACA	Vacation Home	N	01/01/2000	DPW	05/23/2007
ADDTYPE	WORK	Work Address	N	01/01/2000	DPW	01/01/2000
ADDTYPE	VOLA	Volunteer Address	N	06/08/2005	DPW	03/01/2006
ASSIGNMENT	CHR	Chairperson	N	01/01/2000	DPW	01/01/2000
BYWHOM	CTS	Casey T. Stengel	N	01/01/2000	DPW	01/01/2000
BYWHOM	DPW	Donna P. Windars	N	01/01/2000	DPW	01/01/2000

2. Double-click the code you want to inactivate**.**

   The **Edit User-Defined Codes** screen for that code appears.

3. Check the **Inactivate** box.



When you return to the **Change Codes** screen, the **Inactivate?** column for that code will contain a **Y** (for Yes). The code will not appear as available during data entry, but you will be able to display it on reports and use it in filters, if you wish. (Since the code is only inactivated and not deleted from the database, you can reactivate it later by clearing the Inactive check box.)

4. To inactivate another code, press the left-arrow button  or right-arrow button  to find the code and then check the **Inactivate** box.
5. To exit, click **OK**, then click **Done**.

5. Backing Up Your Data

Backing up your data might seem like a waste of time—until you have a system failure and lose all your valuable work! If you make it a practice to back up every day, you will never lose more than a day's worth of data. Even if your organization routinely backs up its computer system, you should still run the DonorPerfect backup daily. The system backup might not be available when you need it, and only your IT organization can help you restore it—DonorPerfect Support cannot help you restore a backup that was not created through DonorPerfect.

Performing a Backup

Backup Guidelines

- You should back up your data every day.
- You should use a different set of backup media for each day of the week—one set for Monday, another set for Tuesday, and so on. That way, if one set is bad, you can restore from the previous day's backup.
- You should store a backup offsite at least once a week (more often for large organizations). Most organizations take their Friday backup offsite.
- You should make a **permanent** backup at least once a month and take it offsite. Do **not** reuse the media. Unlike your weekly offsite backup, which you only keep for one week, the monthly backup is permanent.

Tip: DonorPerfect clients have lost entire computer systems in fires and earthquakes, but as long as they had offsite backups, their most important asset, their database of donors, remained intact. Remember to set aside one day of the week to take your daily backup offsite and to make a separate backup once a month for permanent offsite storage.

▶ To make a backup

Before you begin: If you have a multiuser system, make sure all other users are logged out of DonorPerfect.

Note: If you run into problems making a backup, it may be because DonorPerfect is installed in a directory with spaces in its name. To remedy this situation, rename the DonorPerfect directory using Windows Explorer. For example, change a directory named *DP Files* to DPFiles or DP_Files. Be sure to edit any shortcuts.

1. Click the **Utilities** button, then click **Backup/Restore**.

The **Backup/Restore** screen appears.

2. Select **Backup Data**.
3. When you see the message saying that the backup will be to hard disk only, click **OK**.
4. When you see the message saying that the data and report files have been backed up, click **Done**.

   DonorPerfect creates a file named **DPBack.zip** and places it in the folder where DonorPerfect is installed.

> Tip: To see the last date that the backup was run, go to the Help menu, click About DonorPerfect, and then look in the Date of Backup File field.

6. What Else Can You Do in DonorPerfect?

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

This section tells you what else you can do in DonorPerfect and where you can learn how to do it.

Managing Fundraising Tasks

As you've already learned, DonorPerfect is all about managing your day-to-day fundraising tasks. You will find more detailed information about some of the tasks you've already learned and be introduced to new fundraising management tasks in the *DonorPerfect User Guide*: It covers the following topics:

- DonorPerfect Basics
- Personalizing DonorPerfect
- Setting Up DonorPerfect Codes
- Managing Donor Information
- Working with Selection Filters
- Producing Communications and Mail Merges
- Processing Gifts and Pledges
- Using Additional DonorPerfect Modules

Generating Reports

DonorPerfect provides you with many different types of reports that allow you to monitor the fundraising efforts of your organization. The *DonorPerfect Reports* manual describes those reports and explains how to run them. It covers the following topics:

- Running Reports
- Listings
- Financial Reports
- Maintenance Reports
- Custom Reports
- Report Modules

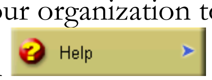
Administering DonorPerfect

Every software application requires some routine setup and maintenance, and DonorPerfect is no exception. The *DonorPerfect Administrator's Guide* explains how to set up DonorPerfect security and maintain your DonorPerfect system. It also tells you how to customize DonorPerfect as your requirements change. It covers the following topics:

- Managing Security
- Maintaining DonorPerfect
- Customizing Screens and Tables
- Defining Parameters
- Creating and Modifying Custom Reports
- Managing Report Modules
- FoxPro and DonorPerfect Functions

Glossary

Batch. A group of donations received on the same day (depending on how frequently you input donations); usually this group forms one bank deposit.

Client ID. A number that uniquely identifies your organization to DonorPerfect. You can find your Client ID by clicking the **Help** button  and then selecting **Help About**. (Your Client ID is **not** the same as your Login ID, which you use to log into DonorPerfect.)

Code. An acronym, abbreviation, or representation for gift types, membership types, activities, and mailings in DonorPerfect. Codes are used to describe records in your DonorPerfect database and to standardize data entry. For example, you can use BD as a code for Board Member.

Donor. An individual or organization that gives donations of money, time, or goods to your organization or is considered a prospect for future donations. Each individual or organization should only have one donor record in the system. The donor represents the tax-paying entity. Examples are Mr. & Mrs. John Doe, The Fred W. Smith Foundation, or First National Bank.

Field. A location in a table that stores information you enter. Examples of DonorPerfect fields are First Name, Gift Amount, or Pledge Date. Fields can be of several different types, including character, numerical, logical (check box), or date.

Gift. A donation of money, time, or goods to your organization. A donor can have one or many gifts recorded in DonorPerfect.

Pledge. A promise or commitment from a donor to make a donation of money at a later date. A donor can have one or many pledges in DonorPerfect.

Table. A data structure consisting of a list of entries. DonorPerfect includes several tables, including the Main table (DP.DBF) and the Address table (DPADD.DBF). You can customize the tables in your system to meet your organization's needs. Tables are sometimes also referred to as files.