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# 1. Introduction

## Overview

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This manual explains how to use DonorPerfect to manage fund-raising at your organization. Because DonorPerfect automatically performs many routine tasks for you, your main job will often be to enter data about donors, gifts, pledges, and so on.

## Who This Manual Is For

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This manual is for DonorPerfect users who want in-depth information about the fund-raising management tasks they can perform with DonorPerfect. If you're just getting started with DonorPerfect and would like a tutorial introduction, see the *DonorPerfect Getting Started Guide*. If you want to know about the available reports and how to run them, see the *DonorPerfect Reports* manual.

## What This Manual Covers

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In addition to this introduction, this manual contains the following sections:

- “DonorPerfect Basics”—see page 11
- “Personalizing DonorPerfect”—see page 11
- “Setting Up DonorPerfect Codes”—see page 41
- “Managing Donor Information”—see page 48
- “Working with Selection Filters”—see page 118
- “Producing Communications & Mail Merges”—see page 144
- “Processing Gifts & Pledges”—see page 171
- “Using Additional DonorPerfect Modules”—see page 195
- “Appendix—Tables & Field Descriptions”—see page 277

## How to Use This Manual

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To learn the basics of DonorPerfect, you should read the *DonorPerfect Getting Started Guide* and then the first five sections of this manual. After you're comfortable with this information, you can skip to any other section of this manual, depending on the task you need to perform.

## Conventions Used in This Manual

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Throughout the manual, 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

### Step-by-Step Instructions

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. The following procedure is an example:

► **To inactivate a code**

1. Click the **Utilities**  button and then select **Code Maintenance**. The **Change Codes** screen appears.
2. Highlight the code you want to make inactive, and double-click it or click **Edit**.
3. Select the **Inactive** check box, and then click **OK**.



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## Other Documentation


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The following additional documentation is available electronically:

- **DonorPerfect Installation Guide:** steps you through the installation process.
- **DonorPerfect Getting Started Guide:** 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 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, as well as additional copies of this manual, from the Clients Only section of the DonorPerfect website. You can also order printed 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/>.

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## 2. DonorPerfect Basics

### Overview

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This chapter introduces you to some basic DonorPerfect concepts and describes the DonorPerfect interface. See the following sections for more information:

- “Screens & Screen Elements”—see page 11
- “Navigation Tools”—see page 19
- “Keystroke & Mouse Conventions”—see page 25

### Screens & Screen Elements

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Information in DonorPerfect is logically organized through its screens.

#### Basic Screens

DonorPerfect allows you to capture and store all the information you need to manage your donor relationships and donations. The screens described in this section are the basic screens that your system will have. Because DonorPerfect is very customizable, you may have different screens or fields in your system.

#### **Main**

The Main screen contains information about your donors, including name, address, telephone, record type, and flags (codes that describe how a donor is associated with your organization). The information you enter on the top part of this screen is stored in the DPADD.DBF table, and the information you enter in the bottom part of this screen is stored in the DP.DBF table. Phone numbers and email addresses are stored in their own table to allow for multiple numbers and addresses.

**Gift**

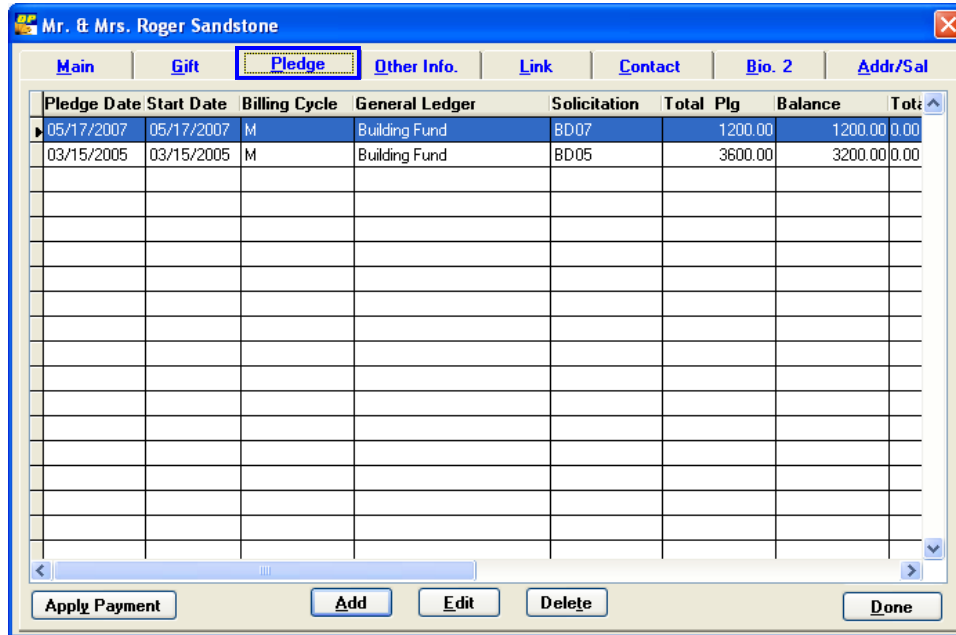
The Gift screen contains information about each donor’s donations. It includes information such as the date of the gift, amount, the type of thank-you letter to send, the general ledger for the gift, type of gift, and other gift information. The information you enter on this screen is stored in the DPGIFT.DBF table.

Date	Amount	Record Type	General Ledger	Solicitation	Type of Gift	Plg Pmt Tylette
06/01/2007	500.00	Gift	Disaster Relief	BQ06	Check	10
06/08/2005	500.00	Gift	Unrestricted	BQ05	Check	10
06/01/2005	100.00	Gift	Building Fund	BD05	Check	P 02
05/15/2005	100.00	Gift	Building Fund	BD05	Check	P 03
04/15/2005	100.00	Gift	Building Fund	BD05	Check	P 03
03/15/2005	100.00	Gift	Building Fund	BD05	Check	P 03
06/21/2004	500.00	Gift	Restricted-Educ	BQ04	Check	03
05/20/2004	600.00	Gift	Membership	UNSO	Check	09
04/01/2004	100.00	Gift	Unrestricted	BQ04	Check	P 03
05/02/2003	500.00	Gift	Membership	MEMB	Check	02
03/12/2003	250.00	Gift	Building Fund	UNSO	Check	02
08/07/2002	100.00	Gift	Disaster Relief	BQ02	Check	P 02
07/11/2002	100.00	Gift	Disaster Relief	BQ02	Check	P 03
03/21/2002	1500.00	Soft Credi	Unrestricted	BQ00	Soft Credit	99
02/13/2002	1500.00	Gift	Unrestricted	BD00	Check	02
01/15/2002	80.00	Gift	Unrestricted	MEMR	Check	01
10/15/2001	200.00	Gift	Unrestricted	SM01	Check	01
09/02/2001	1000.00	Gift	Restricted-Educ	MEMR	Check	01

**Pledge**

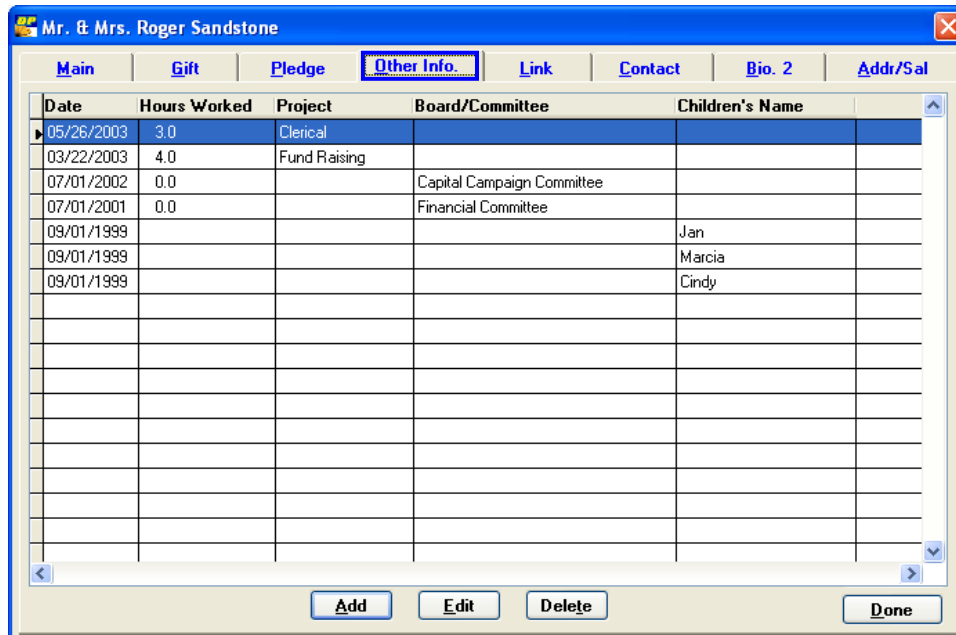
The Pledge screen contains information on a donor’s pledges. It includes information on the date of the pledge, the total amount of the pledge, how often the donor is billed for the pledge,

and the amount the donor is billed in each billing cycle. The information you enter on this screen is stored in the DPGIFT.DBF table.

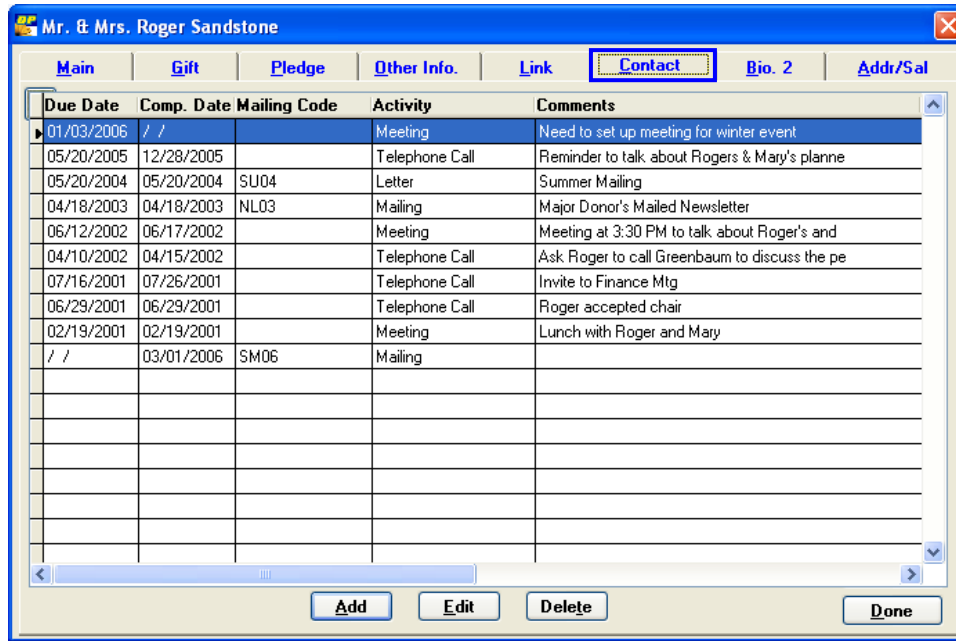


**Other Info.**

The Other Info. Screen allows you to capture additional transactional information about a donor and maintain it over time. Each organization uses this screen differently, but it has many possibilities. For example, you could track volunteer hours, board terms, or student information on this screen. The information you enter on this screen is stored in the DPOTHER.DBF table.

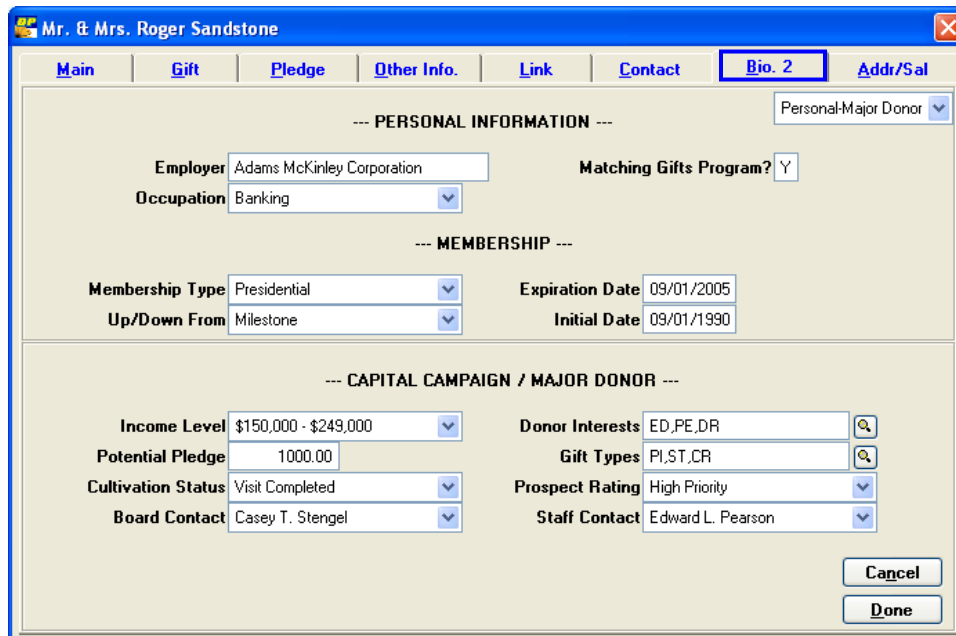






**Bio. 2**

The Bio. 2 screen stores additional information about a donor. You can use this screen in any number of ways. For example, you can use it to store additional personal information such as employer or occupation, membership information, capital campaign information, or volunteer profile information. The information you enter on this screen is stored in the DP.DBF table.



**Addr/Sal**

The Addr/Sal screen allows you to enter additional address information for a donor or additional salutations. You can use this screen to handle seasonal addresses and define how a





## Screen Elements

DonorPerfect uses many common screen elements throughout the system. See the following sections for details on the screen elements and how they are used.

### Check Boxes

Check boxes are used to allow you to enable or disable an option or a feature. For example, on the Listings and Mailings screen, there are several check boxes that you can check to include or exclude information, or to perform a specific action when creating a listing or mailing.

### Radio Buttons

Radio buttons are used to allow you to make one choice among several options. For example, the radio buttons on the Listings and Mailings screen allow you to choose in what order you want the information sorted.

### Fields

Fields are used to store specific information for each donor. For example, the Main Screen has fields for Last Name and First Name. Some DonorPerfect fields only allow you to enter one value while others allow you to enter multiple values.

**Mr. & Mrs. Roger Sandstone**

**Main** | Gift | Pledge | Other Info. | Link | Contact | Bio. 2 | Addr/Sal

Last Name: Sandstone | Suffix: | Title (Mr./Ms.): Mr. & Mrs. | Address Type: VACA  
 First Name: Roger | Dear: Roger and Mary  
 Prof. Title: | Optional Line: |

Address: 446 Sea Spray Terrace | City: Boca Raton | ST: FL | Zip: 33087-3356 | Country: | Do Not Mail:  | Reason: |

Spouse/Partner: Mary | Entry Date: 01/10/1998 | FDC | Last Update: 05/17/2007 | DPW  
 Flags: BD,PT,VL,DE,FC | Record Type: Individual | Donor Solicitor: Bronco L. Nagurski | Last Mail Date: 03/01/2006  
 Recent Mail: SM06,NL03,NL04 | Potential: Up to \$9,999

Web Site: www.donorperfect.com

Buttons: Cancel, Done

Figure 2-1 Sample Fields

### Coded Fields

In DonorPerfect, many fields contain codes that are abbreviations for frequently-used data. For example, the Gift screen uses codes in the Solicitation and Tyletter fields. Codes simplify data entry and ensure consistency for reports. Coded fields can be pull-downs or entry fields that allow you to enter the code.

**Mr. & Mrs. Roger Sandstone**

**Main** | **Gift** | Pledge | Other Info. | Link | Contact | Bio. 2 | Addr/Sal












Date	Amount	Record Type	General Ledger	Solicitation	Type of Gift	Plg Pm	Tylett
06/01/2007	500.00	Gift	Disaster Relief	BQ06	Check		10
06/08/2005	500.00	Gift	Unrestricted	BQ05	Check		10
06/01/2005	100.00	Gift	Building Fund	BD05	Check	P	02
05/15/2005	100.00	Gift	Building Fund	BD05	Check	P	03
04/15/2005	100.00	Gift	Building Fund	BD05	Check	P	03
03/15/2005	100.00	Gift	Building Fund	BD05	Check	P	03
06/21/2004	500.00	Gift	Restricted-Educ	BQ04	Check		03
05/20/2004	600.00	Gift	Membership	UNSO	Check		09
04/01/2004	100.00	Gift	Unrestricted	BQ04	Check	P	03
05/02/2003	500.00	Gift	Membership	MEMB	Check		02
03/12/2003	250.00	Gift	Building Fund	UNSO	Check		02
08/07/2002	100.00	Gift	Disaster Relief	BQ02	Check	P	02
07/11/2002	100.00	Gift	Disaster Relief	BQ02	Check	P	03
03/21/2002	1500.00	Soft Credit	Unrestricted	BQ00	Soft Credit		99
02/13/2002	1500.00	Gift	Unrestricted	BD00	Check		02
01/15/2002	80.00	Gift	Unrestricted	MEMR	Check		01
10/15/2001	200.00	Gift	Unrestricted	SM01	Check		01
09/02/2001	1000.00	Gift	Restricted-Educ	MEMR	Check		01

Buttons: Add, Edit, Delete, Done

### Toolbar

When one of the basic screens is activated (i.e., when you click on its tab), a toolbar appears at the top of the DonorPerfect window. See the following table for information about each button on the toolbar.




Button	Description
	<b>Previous</b> —Goes to the previous donor record. If you searched for the record based on name, the system goes to the previous alphabetical name. If you searched for the record based on a record number, the system goes to the previous record number.
	<b>Record Number</b> —The DonorPerfect-assigned number that identifies the donor's record in the system.
	<b>Next</b> —Goes to the next donor record. If you searched for the record based on name, the system goes to the next alphabetical name. If you searched for the record based on a record number, the system goes to the next record number.
	<b>Narrative</b> —Activates the Narrative Entry screen, where you can add notes related to the donor. Spell checking is available in the Narrative Entry screen via a Check Spelling button. Text entered here appears on the "Info Sheet" report, so care should be taken with confidential information.
	<b>Gift History</b> —Activates the Giving History screen, which allows you to view a donor's gift and pledge history, and a number of calculated fields.
	<b>Cross-reference Record</b> —Creates an additional lookup for the current donor record. If the record is for an individual, the cross-reference is created for the name listed in the Optional Line field on the Main screen. If the record is for an organization, the cross-reference is created for the person listed in the Contact field on the Main screen.
	<b>Print</b> —Activates the Single Printouts screen, where you can choose to print an envelope, information sheet, giving history, custom report, or Insta-Merge for the current donor record.
	<b>Split Gifts</b> — Activates the Enter Split Gifts screen, where you can enter information on a donation that will be divided among different purposes or general ledgers. This button is only available when it appears in color—when the Gift screen is open. At all other times it is gray and unavailable.
	<b>Put Address Block in Clipboard</b> —Copies the address of the current record to the clipboard, so it's available to paste into an email or another program. To use the keyboard for this option, click CTRL+B. This button may not be active. You can activate it on the Entry Screen Parameters screen. See "Defining Entry Screen Parameters" in the <i>DonorPerfect Administrator's Guide</i> .
	<b>Send an Email</b> —Activates the Send Email form, which you can complete with a Subject and message to send an email to the donor.
	<b>Wealth Engine</b> —If you have the optional Wealth Engine module, opens an Internet Explorer window and displays a Wealth Engine profile report using information from the donor record.

## Navigation Tools

DonorPerfect gives you several tools that you can use to easily and quickly navigate through the system.

## Welcome Screen

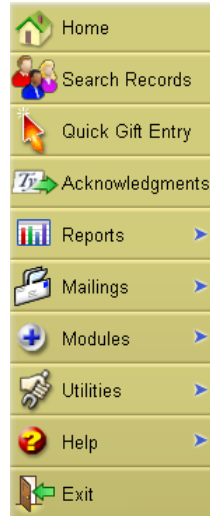
The Welcome screen is like a dashboard with two customizable sections: one for shortcuts to the areas of DonorPerfect you use most often and another for quick access to your favorite reports. The Welcome screen appears right after you log into DonorPerfect. You can also

display it by pressing the **Home** button . To navigate to a shortcut or report on the Welcome screen, simply click on it. For information about changing what's listed on the Welcome screen and editing parameters of favorite reports, see "Setting Up the Welcome Screen" on page 27.






## Navigation Bar



The DonorPerfect navigation bar provides easy access to DonorPerfect screens and functions. It appears at the left side of the DonorPerfect window and is always available. See the table below for information about each navigation bar button.



Button	Description
Home	<b>Home</b> —Opens the Welcome screen, which you can customize to display links to the DonorPerfect functions and reports you use most often.
Search Records	<b>Search Records</b> —Displays the Enter Name to Lookup screen, where you can search for an existing donor record or add a new one.
Quick Gift Entry	<b>Quick Gift Entry</b> —Takes you to the Quick Entry screen, where you can quickly enter a group of gifts or pledge payments from <b>existing</b> donors, as long as you know their names or Donor ID #s.
Acknowledgments	<b>Acknowledgments</b> —Activates the Acknowledgment Processing screen, where you can run a listing of the current batch of gifts, process thank-you letter acknowledgments, and update the batch number. The batch listings available here can be run for any gifts or pledges in the system, independent of Acknowledgment Processing.
Reports ▾ Contact Manager Custom Reports Event Reports Financial Listings Membership My Reports School Module	<b>Reports</b> —Allows you to run reports and create your own custom reports: <ul style="list-style-type: none"> <li>• <b>Contact Manager</b>—Opens the Contact Management Reports screen, which lists all of the outstanding activities and tasks for one specific user (if your system uses passwords) or for all users.</li> <li>• <b>Custom Reports</b>—Takes you to the Custom Reports screen, where you can run a custom report or do any of the following: create a custom report, copy a custom report, modify a custom report, rename a custom report, or delete a custom report.</li> <li>• <b>Event Reports</b>—Takes you to the Event Reports screen, where you can run a number of reports related to the Event Management Module.</li> <li>• <b>Financial</b>—Allows you to run financial reports from the following categories: Fund-raising Reports, Solicitation Reports, Pledge Reports, Giving Analysis Reports,</li> </ul>

Button	Description
	<p>Form Reports, Memorial Reports, General Ledger Reports.</p> <ul style="list-style-type: none"> <li>• <b>Listings</b>—Activates the Listings and Mailings screen, where you can run listings (History List, Summary List, Linear List, Info Sheet, Count Records), labels, and group emails; produce mail merge data files; and export information to a file.</li> <li>• <b>Membership</b>—Allows you to run a Membership report.</li> <li>• <b>My Reports</b>—Lets you access the My Reports screen, a dashboard of favorite reports.</li> <li>• <b>School Module</b>—Allows you to run a School report.</li> </ul> <p>For information about running any of these reports, see the <i>DonorPerfect Reports</i> manual. For information about creating custom reports using the Custom Reports selection, see “Creating &amp; Modifying Custom Reports” in the <i>DonorPerfect Administrator’s Guide</i>.</p>
<p> <b>Mailings</b> ▼</p> <ul style="list-style-type: none"> <li>Export Templates</li> <li>Group Email</li> <li>Labels</li> <li>Mailmerge</li> <li>Pledge Processing</li> </ul>	<p><b>Mailings</b>—Lets you create labels, mail merges, group emails, and pledge reminders—and choose an export format for your mailings.</p> <ul style="list-style-type: none"> <li>• <b>Export Templates</b>—Lets you choose an export format for donor and address information. See “Managing Export Templates” for details.</li> <li>• <b>Group Email</b>—Activates the Listings and Mailing screen, where you can create an email to send to a group of donors in your system. See “Running Group Emails” for details.</li> <li>• <b>Labels</b>—Activates the Listings and Mailings screen, where you have the option to create labels. See “Producing Labels” for details.</li> <li>• <b>Mailmerge</b>—Activates the Listings and Mailings screen, where you have the option to create mail merge files. See “Mail Merge” for details.</li> <li>• <b>Pledge Processing</b>—Activates the Create Pledge Reminders screen, where you can generate pledge reminders. See “Creating Pledge Reminders” for details.</li> </ul>
<p> <b>Modules</b> ▼</p> <ul style="list-style-type: none"> <li>Accounting Interface</li> <li>Constant Contact</li> <li>Donate.Net Import</li> <li>EFT Transactions</li> <li>Event Management</li> <li>Import Outlook Email</li> <li>Import Records</li> <li>Insta-Charge</li> <li>Moves Management</li> <li>Pre-Authorized Payment</li> <li>Scan Gifts</li> <li>WealthEngine Setup</li> <li>WebLink Import</li> </ul>	<p><b>Modules</b>—Allows you to select a separate DonorPerfect module. Only the modules your organization has purchased are available. For information about using these modules, see “Using Additional DonorPerfect Modules” page 195.</p>

Button	Description
 <b>Utilities</b> ▼ Back Up/Restore Change Parameters Change User Options Code Maintenance Duplicate Maintenance Edit User-Defined Filters Flexible Info Generator Recalculate Reindex Files Restore Deleted Record Run a Custom Program Screen Generator Set Defaults	<p><b>Utilities</b>—Lets you access system settings; security, customization, and data manipulation tools; and other administrative functions, such as backup and restore:</p> <ul style="list-style-type: none"> <li>• <b>Backup/Restore</b>—Takes you to the Backup/Restore screen, where you can back up your data or restore an existing backup. See “Backing Up and Restoring Your System” in the <i>DonorPerfect Administrator’s Guide</i>.</li> <li>• <b>Change Parameters</b>—Allows you to manage user-defined settings through the following features: Other Parameters (see “Defining Parameters” in the <i>DonorPerfect Administrator’s Guide</i>), Field Name Descriptions (see page 142), Add Mailmerge Fields (see page 158), Change Reports/Labels (see “Customizing Report and Label Formats” in the <i>DonorPerfect Administrator’s Guide</i>), and User Security Settings (see “Managing Security” in the <i>DonorPerfect Administrator’s Guide</i>).</li> <li>• <b>Change User Options</b>—Allows you to change your password and specify parameters for word processing, mail merge, and more—even if you don’t have access to Password Maintenance.</li> <li>• <b>Code Maintenance</b>—Activates the Change Codes screen, which allows you to manage the codes (abbreviations for gift types, membership types, activities, mailings, and so on) in your system. See page 29.</li> <li>• <b>Duplicate Maintenance</b>—Allows you to check the records in your system for duplicates and then combine them. See “Removing Duplicate Records” in the <i>DonorPerfect Administrator’s Guide</i>.</li> <li>• <b>Edit User-Defined Filters</b>—Lets you display, save, edit, copy, and delete user-defined selection filters.</li> <li>• <b>Flexible Info Generator</b>—Gives fast answers to many different inquiries and quickly performs specific actions, including counting records in the system, totaling a field, exporting a file, and browsing records. It is also used to make mass changes to large amounts of records or to globally delete records from the system.</li> <li>• <b>Recalculate</b>—Lets you redefine calculated fields in your system. You can recalculate any of the following: Gift Totals, Auto-Calc Fields, Pledge Balance/Delinquents Amounts, User-Defined Calculation, and Volunteer Totals, (see “Recalculating Information in DonorPerfect” in the <i>DonorPerfect Administrator’s Guide</i>). You can also Write-off Pledges Balance (see page 194).</li> <li>• <b>Reindex Files</b>—Reindexes files in the DonorPerfect system. This option is usually only used when the system has been shut down incorrectly and an error message suggests reindexing. See “Reindexing Your System” in the <i>DonorPerfect Administrator’s Guide</i> for information.</li> <li>• <b>Restore Deleted Record</b>—Allows you to look up a record that has been deleted and restore it (including all gift and transactional information) back into the system. See page 66.</li> <li>• <b>Run a Custom Program</b>—Allows you to run any of the DonorPerfect custom programs.</li> </ul>

Button	Description
	<ul style="list-style-type: none"> <li>• <b>Screen Generator</b>—Allows you to manage the fields on your screens through the following features: Modify Data Entry Screens, Modify Other Screens, Display Sample Screen, and Screen Layout Report. See “Customizing Screens &amp; Tables” in the <i>DonorPerfect Administrator’s Guide</i> for details.</li> <li>• <b>Set Defaults</b>—Allows you to set the defaults (information automatically entered into DonorPerfect fields) for each screen in your system. See page 29.</li> </ul>
<div style="background-color: #f0f0f0; padding: 2px;">  <b>Help</b> </div> <ul style="list-style-type: none"> <li>About DonorPerfect</li> <li>DonorPerfect Functions</li> <li>DonorPerfect Website</li> <li>Edit Function Keys</li> <li>Error History</li> <li>Help</li> <li>Keystroke Conventions</li> <li>Mouse Conventions</li> <li>Program Functions</li> <li>User Defined Website</li> </ul>	<p><b>Help</b>— Provides useful information about DonorPerfect:</p> <ul style="list-style-type: none"> <li>• <b>About DonorPerfect</b>—Provides details about your DonorPerfect system, including the number of user licenses, when your fiscal year begins, who the system is registered to, which directory the program is saved in, which directory is used for mail merges, the date of the last backup file, and your client ID.</li> <li>• <b>DonorPerfect Functions</b>—Describes the system functions you can use in DonorPerfect (see “DonorPerfect Functions” in the <i>DonorPerfect Administrator’s Guide</i>).</li> <li>• <b>DonorPerfect Website</b>—Takes you to the DonorPerfect website.</li> <li>• <b>Edit Function Keys</b>—Displays function key combinations you can use to automatically insert data in data entry fields. You can also change the existing data for a key combination, or add data to a blank field to create a new function key combination.</li> <li>• <b>Error History</b>—Displays a list of errors DonorPerfect has generated. These errors can be useful in diagnosing and solving problems. You can view an error report onscreen or print a copy.</li> <li>• <b>Help</b>— Launches online help, where you can access information on how to use DonorPerfect and its features.</li> <li>• <b>Keystroke Conventions</b>—Describes keyboard combinations you can use in place of the mouse to quickly navigate DonorPerfect, select interface elements, and enter data. (see page 25).</li> <li>• <b>Mouse Conventions</b>—Describes the different mouse clicks you can use in DonorPerfect. (see page 26).</li> <li>• <b>Program Functions</b>—Describes the FoxPro data functions you can use in DonorPerfect (see “FoxPro Functions” in the <i>DonorPerfect Administrator’s Guide</i>).</li> <li>• <b>User Defined Website</b>—Takes you to a website that you define on the General Parameters screen. (Click the <b>Utilities</b> button and select <b>Change Parameters, Other Parameters, and General Parameters</b>. Then type the website address in the <b>User Defined Icon</b> field).</li> </ul>
<div style="background-color: #f0f0f0; padding: 2px;">  <b>Exit</b> </div>	<p><b>Exit</b>— Exits DonorPerfect.</p>



## Menus

In addition to the navigation bar, DonorPerfect contains menus for accessing DonorPerfect's screens and functions. Some of the menus and menu items duplicate the functionality of the navigation bar buttons and selections. They are included for the convenience of those who used DonorPerfect prior to version 9.

## Keystroke & Mouse Conventions

A number of keystroke and mouse conventions are available to save you time.

### Keystroke Conventions for Navigation and Data Entry

Keystroke	Description
<b>CTRL+0 (CTRL+zero)</b>	In a date field, fills in the current date, and then moves to the next field.
<b>CTRL+B</b>	Copies the address of the current record to the clipboard, so it's available to paste into an email or another program.
<b>CTRL+F4</b>	Closes the current screen and saves any changes.
<b>CTRL+D</b>	Activates the Giving History screen, where you view all gifts from the active donor record.
<b>CTRL+N</b>	Activates the Narrative History screen, where you can enter a note for the active record.
<b>CTRL+P</b>	Activates the Single Printouts screen, where you can produce an envelope, Information Listing, Giving History report, custom report, or mail merge letter for the active donor record.
<b>CTRL+S</b>	Activates the Enter Split Gift screen, where you can enter a split gift transaction for the active donor record.
<b>CTRL+T</b>	Activates the Phone Numbers screen, where you can add or edit phone numbers for the active donor record.
<b>ESCAPE</b>	Closes the current screen without saving any changes.
<b>TAB</b>	Moves the cursor from field to field.
<b>F1</b>	Activates the online help.
<b>F2</b>	Lists the available codes for the highlighted field and their descriptions.
<b>F4</b>	Enters the current date in the Notes field.
<b>F5</b>	Enters the current date and the User ID in the Notes field.
<b>PAGE DOWN</b>	When you're on the Main screen, takes you to the Gift screen.

## Keystroke Conventions for Selecting Objects

Object	Keystrokes
Check box	Move to the check box and press the SPACE BAR to check it.
Button	Move to the button and press ENTER.
List box	Highlight the desired item in the list and then press ENTER.
Radio button	Move to the radio button and press the SPACE BAR.
Hot keys	Any object with an underlined letter can be selected by pressing ALT+ the underlined letter. For example, the Done button appears as <u>D</u> one on-screen; to select it, press ALT+D.

## Mouse Conventions

Mouse Convention	Description
Right-click	In coded fields, shows a list of available codes and descriptions. In date fields, activates a calendar, from which you can select a date by clicking on it.
Double-click	Highlights the word where your mouse is located in a selected field.
Triple-click	Highlights the entire field where your mouse is located.

## 3. Personalizing DonorPerfect

### Overview

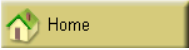
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If you have a DonorPerfect password, you can personalize your Welcome screen, data entry defaults, and user options. These personalizations are extensions of your password settings. The following sections in this chapter explain how to personalize DonorPerfect:

- “Setting Up the Welcome Screen”—see page 27
- “Setting Data Entry Default Values”—see page 29
- “Setting User Options”—see page 31

### Setting Up the Welcome Screen


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The Welcome screen, which is displayed when you log into DonorPerfect or press the **Home** button , provides quick links to DonorPerfect program functions and reports—and it's completely customizable. You can change the program and report links, and edit the parameters of the linked reports, directly from the Welcome screen.

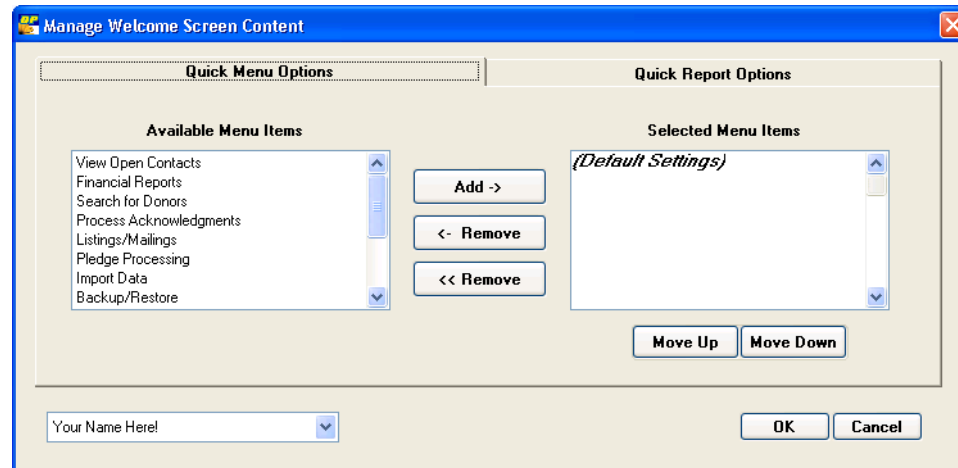
### Changing the Links on the Welcome Screen


You can create your own personalized list of links on the Welcome screen—and change them whenever your needs change. For example, you might initially set up the Welcome screen to include the functions and reports you use most of the time, and then change it during a hectic event season.

#### ► To change the links on the Welcome screen

1. On the **Welcome** screen, click the **Edit List** button .

The Manage Welcome Screen Content screen appears.



 **Important!** If you are an administrator and are customizing the **Welcome** screen for someone else, select the person's user name in the drop-down list at the bottom-left before proceeding.

2. To add program function shortcuts to the **Welcome** screen, click the **Quick Menu Options** tab.
3. In the “**Available . . .**” area on the left, click an item you want to place on the **Welcome** screen, and then click the **Add ->** button.  
The item is moved to the “**Selected . . .**” area on the right.
4. Repeat step 3 until you are finished adding items. You can have up to five items in the “**Selected . . .**” area.
5. To change the order in which an item appears on the **Welcome** screen, highlight the item and click the **Move Up** or **Move Down** button.
6. If you decide that you don't want one of the items in the “**Selected . . .**” area to be on the **Welcome** screen, move it to the “**Available . . .**” area by clicking the **<- Remove** button. To move all of the items from the “**Selected . . .**” area to the “**Available . . .**” area, click the **<< Remove** button.
7. To add reports to the **Welcome** screen, click the **Quick Report Options** tab and then repeat steps 3–6.
8. When you're finished changing links, click **OK**.  
The **Welcome** screen appears with the changes you made.

## Editing the Parameters of Favorite Reports

When you click a favorite report, it runs using the default report parameters. If necessary, you can always change the default parameters before running the report.

► **To edit the parameters of a favorite report**

1. On the **Welcome** screen, right-click the report.

The **DonorPerfect Reports Screen** appears. The contents of this screen vary, depending on the report selected. Section **1** designates the report category, section **2** names the report, and section **3** contains options you can modify.

2. Make your changes in section **3**. For information about the options in this section, see the *DonorPerfect Reports* manual.
3. If you want to view the report on your screen, click **Preview**. If you want to print it, click **Print**, choose the printer, and then click **OK**.
4. To save your changes as the new default parameters, click **Save**.
5. To discard your changes and retain the original default parameters, click **Cancel**.

## Setting Data Entry Default Values

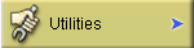
In DonorPerfect, you can speed data entry by setting default values for the data entry fields on your screen. These default values are automatically entered when a new record is created and are very useful if you need to repeatedly enter the same data on a screen. For example, if the majority of your incoming gifts have a General Ledger code of **UN** and a Solicitation code of **DM07**, set these values as your defaults. You always have the option to overwrite the defaults. Because it is easy to change default values, you can even set them daily as your data entry tasks changes.



**Note:** If your system uses passwords, you have the option to set defaults per user; see “Entry Screen Parameters” in the *DonorPerfect Administrator’s Guide* for details. This allows each user to set defaults for their own needs. If password protection is not turned on (single user version only) or the “Assign defaults per user” option is not selected in Entry Screen Parameters, changing the default values will affect all DonorPerfect users.

The default values you define are automatically completed when you create a new record. For the Main screen, you have the option to define separate defaults for individuals and organizations.

► **To set default values**

1. Click the **Utilities** button  and then select **Set Defaults**. The **Select a Screen** dialog box appears.
2. Click the entry screen for which you want to set defaults: Main, Gift, Pledge, Other Info., Link, Contact, Bio. 2, or Addr/Sal. The **Set Defaults** screen for the entry screen you selected appears. If the Main screen is chosen, the system prompts you with a message, asking if you want to display the screen for an Individual or Organization.

3. Enter the default values in the desired fields.
4. Click **Done**.

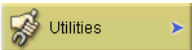
## Setting User Options

You can define a number of preferences and options for working with DonorPerfect. You can save keystrokes by creating function keys that automatically type a phrase when press a function key. You can also save, edit, copy, or delete user-defined selection filters—and see a list of all your user-defined selection filters. In addition, you can change your own password and specify user parameters, even if you don't have access to Password Maintenance.

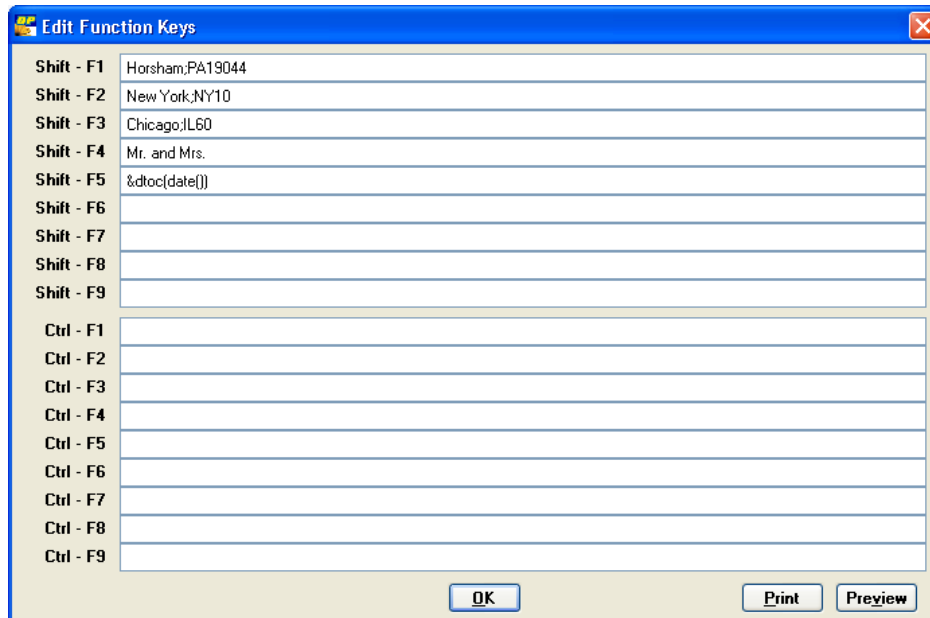
### Defining User-Defined Function Keys

You can save keystrokes by creating function keys that automatically type a phrase when you press a function key. You can define the following function keys: SHIFT+F1 to SHIFT+F9 and CTRL+F1 to CTRL+F9.

► **To define a function key**

1. Click the **Help** button  and then select **Edit Function Keys**. The **Edit Function Keys** screen appears.
2. In the row that has the function key (for example, Shift-F1) you want to use, enter the phrase you want the system to type when you use the function key.

For example, if your donors live in Horsham, create a function key for the city, state, and zip code, as the following graphic illustrates.



3. Click **OK**.

## Sample Function Keys

You can define function keys in any number of ways in DonorPerfect. This section details some function key examples and explanations of each.

- ***SHIFT+F1: Horsham; PA19044***

The semi-colon causes the TAB key to be pressed (it's not necessary to use a semi-colon after PA because DonorPerfect automatically takes you to the next field when you complete the State field). To use this function key, press SHIFT+F1 when in the city field on the Main screen.

- ***Formula functions***

To place a formula into a function key, precede the formula with &. The formula must be of a character type. Examples are:

today's date	&dtoc(date())
one year from today	&dtoc(date()+365)
today's date + user id	&dtoc(date()) + dpuser.idcode

## Saving and Managing Filters

You can save, edit, copy, or delete user-defined selection filters. In addition, you can see a list of all your user-defined selection filters.

### Saving User-Defined Filters

Any criteria entered through the DP Selection Screen as a selection filter can be saved for future use. Once you save a selection filter to the system, it's available on the Selection Criteria Screen.

#### ► To save a user-defined filter

1. From any report or listing selection screen, select the **Set Selection Filter** check box.
2. Select the Build a Selection Filter check box. The DP Selection Screen appears.
3. Define your selection filter (for more information on selection filters, see page 118).
4. Click the Finished, Go to Verify Selection check box, and then click the Continue button. The Selection Verification Screen appears.
5. Click the **Save Filter** button. A message appears asking if you want to save the criteria for future searches.
6. Click **Yes**. A new section appears at the bottom of the screen.

The screenshot shows a form with the following elements:

- A text input field labeled "Description".
- A text input field labeled "User Group".
- A text input field labeled "Filter Name".
- A checkbox labeled "Shared?" which is checked.
- An "OK" button.



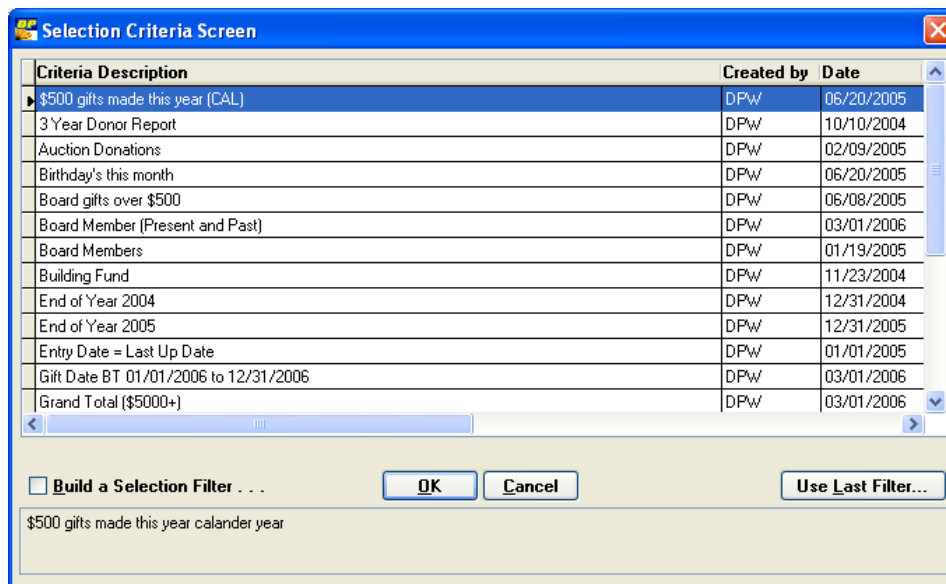
7. In the **Filter Name** field, enter the name with which you want to save your user-defined filter. Use a name that describes what you've included in the filter (for example, Auction Gifts).
8. If you want to restrict the filter to users in a particular group, enter the group number in the **User Group** field.
9. If you want to make the filter available to other users, click the **Shared** check box.
10. If desired, enter a **Description**. Generally, the filter name provides enough space to clearly identify the filter; however, you may want to enter a more detailed description, which is shown when you highlight a filter.
11. Click **OK**. Your selection filter is saved to the system and available for future use.

### Using a Saved Selection Filter

Once you've saved a selection filter, you can use it at any time, except in the Flexible Information Generator.

#### ► To use a saved selection filter

1. From any report or listing selection screen, select the **Set Selection Filter** check box. The **Selection Criteria** screen appears.
2. From the filter list that appears, choose the saved filter you want to use.



3. Click **OK**. The **Selection Verification Screen** appears. You may edit the filter here, but your edits will not be saved for future use. To edit your saved filter, see the following section.
4. Click **OK**.

### ***Copying, Editing, or Deleting a Saved Selection Filter***

Through the **Change User-Defined Filters** screen, you have the option to copy, edit, or delete saved selection filters. When copying or editing selection filters through this screen, you need to enter the selection filter just as you would if you were modifying it on the Selection Verification Screen.


Here are a few things to remember about editing filters:

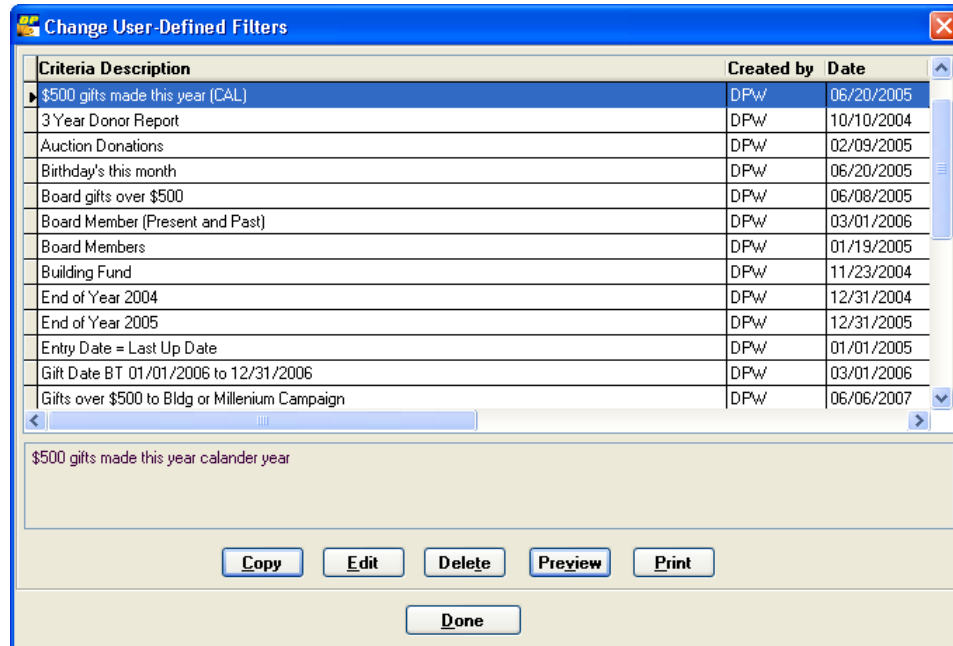
- **Use quotes around words.** Field names never have quotes around them, but the comparison string does. Do not place quotes around numbers unless they are in a character type field such as zip code. Examples: **st = "PA"**
- **Substring Search.** The *\$ substring search* formula syntax is *substring \$ field*. In English, read the **\$** as "within". For example, if searching for everyone with **BRD** within the **FLAGS** field, the criteria would be: **"BRD" \$ flags**
- **Variable Dates.** Place {DT1} and {DT2} in the criteria search to allow you to enter a variable date each time you use the selection filter. For example, **ls\_dt >= {dt1}** would find everyone with a last gift date greater than the date entered in the "Dt1" box at the top of the Edit Criteria screen.

## Editing a Selection Filter

Saved selection filters can be edited at any time.

### ► To edit a saved selection filter

1. Click the **Utilities** button  and then select **Edit User-Defined Filters**.

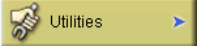


2. Click the selection filter you want to edit, and then click the **Edit** button. The **Selection Verification Screen** appears.
3. Make the desired changes, and click **OK**.
4. Click **Done**.

### *Copying a Selection Filter*

If you want to create a filter that is similar to an existing one, you can simply copy the existing one and edit it as necessary.

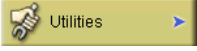
#### ► To copy a filter

1. Click the **Utilities** button  and then select **Edit User-Defined Filters**.
2. Click the filter you want to copy, and then click the **Copy** button. The **Selection Verification Screen** appears, showing the selection filter you copied.
3. Make the necessary changes to the selection filter.
4. In the **Filter Name** field, enter a name for this copied filter.
5. If you want to restrict the filter to users in a particular group, enter the group number in the **User Group** field.
6. If desired, enter a **Description**.
7. Click **OK**.

### *Deleting a Selection Filter*

You may need to delete a selection filter you've created.


#### ► To delete a filter

1. Click the **Utilities** button  and then select **Edit User-Defined Filters**.
2. Click the filter you want to delete, and then click the **Delete** button. A message appears, asking if you're sure you want to delete the record.
3. Click **Yes**. The filter is deleted.

### List of User-Defined Filters Report

This report shows a listing of user-defined filters.

► **To run the List of User-Defined Filters**

1. Click the **Utilities** button  and then select **Edit User-Defined Filters**.
2. If you want to view the list on your screen, click **Preview**. If you want to print it, click **Print**, choose the printer, and then click **OK**.

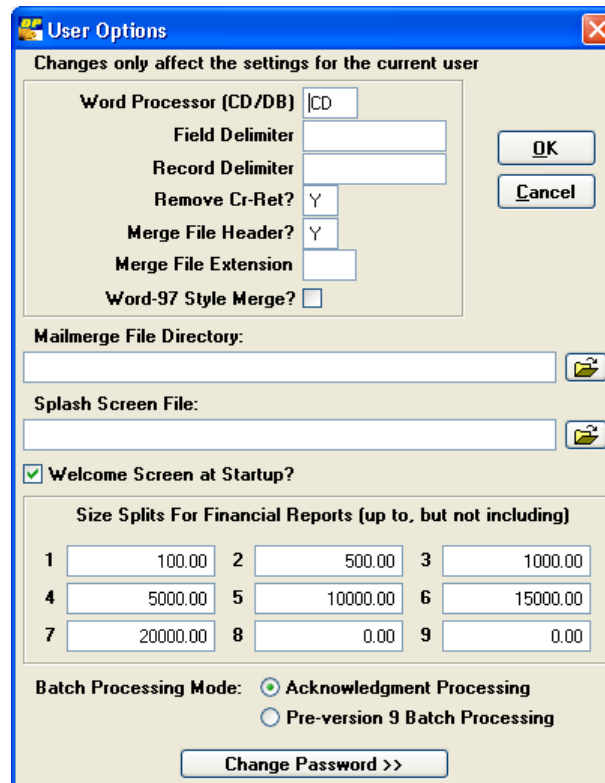
Filter Name	Listing of User-Defined Filters
\$500 gifts made this year (CAL)	AND
dpgift.rectype="G" and (dpgift.amt>=500 and year(dpgift.date) = YEAR(DATE()))	
3 Year Donor Report	AND
(dp.ytd> 0 and dp.ly_ytd> 0 and dp.ly2_ytd> 0)	
Auction Donations	AND
dpgift.rectype="G" and (dpgift.sol= "AU")	
Birthday's this month	AND
month(dp.bdat) = month(DATE())	
Board gifts over \$500	AND
("BD"\$dp.flags ) dpgift.rectype="G" and (dpgift.amt> 500)	
Board Member (Present and Past)	AND
("BD"\$dp.flags or "PB"\$dp.flags)	
Board Members	AND
("BD"\$dp.flags)	
Building Fund	AND
dpgift.rectype="G" and (dpgift.g= "BF")	
End of Year 2004	AND
dpgift.rectype="G" and (between(dpgift.date,(dt1),(dt2)))	
End of Year 2005	AND
dpgift.rectype="G" and (between(dpgift.date,(dt1),(dt2)))	
Entry Date = Last Up Date	AND

## Setting User Preferences

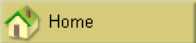
You can change your own password and specify a number of user parameters even if you don't have access to Password Maintenance.

### ► To set user preferences

1. Click the **Utilities** button  and then select **Change User Options**. The **User Options** screen appears.



2. Make changes to any of the following fields:
  - **Word Processor (CD/DB):** this sets the format of the mail merge data file that is created for letters, acknowledgements, and pledge reminders. The delimiters are **CD** (comma-delimited) or **DB** (dBase). **CD** is recommended for most word processors, including MS Word and WordPerfect. If the DB format is used, both a dBase and comma delimited file are created whenever a mail merge data file is made.
  - **Field Delimiter/Record Delimiter:** if the desired mail merge data file delimiter is neither dBase nor comma-delimited, then enter the applicable field and record delimiter; otherwise, leave these fields blank.
  - **Remove CR-Ret:** if you want to remove the carriage return at the end of the file, select this check box. If you are using MS Word, select it; if you're using WordPerfect, don't select it.

- **Merge File Header:** if you want the top record of the mail merge data file to include field names, select this check box. This is required for MS Word comma delimited files.
- **Merge File Extension:** this option allows you to change the extension of the mail merge data file. The default extension for mail merge data files is **.CSV** (**DONMRG.CSV**, **DONPLG.CSV** AND **TY.CSV**), unless the file type is set to dBase, in which case, it is **.DBF**. If you have the mail merge delimiter set to **DB** (dBase), the mail merge file will still have the extension of dbf. A comma delimited file is also created when the DB delimiter is used, and that file will have the extension set here.
- **Word97-Style Merges:** if you're using MS Word 97, select this check box; Word 97 requires a slightly different merge data file format than MS Word 2000. Selecting this box will prevent error messages from appearing when running mail merges. This checkbox affects the last character of the data file. When this option is checked, the data file will have a carriage return at the end (Word 97 format). This option only takes affect when the **Remove Cr-RET** check box is set to **Y**. Otherwise, a complete Carriage Return and Line Feed is placed at the end of the file.
- **Merge File Directory:** enter the directory in which the mail merge files will be placed. If blank, the data files are placed in the DonorPerfect directory.
- **Splash Screen File:** enter the full path and file name for the file that appears as this user's DonorPerfect background splash screen. Any .JPG, .BMP or .ICO file can be used.
- **Welcome Screen at Startup:** if you want the Welcome screen to be displayed at startup, select this check box. The Welcome screen contains links to DonorPerfect program functions and reports, and you can modify the links at any time to include your current favorites (see page 27). If you don't select to display the Welcome screen at startup, you can always access it by clicking the Home button .
- **Size Splits for Financial Reports:** The Income Analysis Report groups the total gift counts and amount by the size splits you enter here. In fields **1-9**, enter each dollar amount you want the Income Analysis Report to use to group gifts. 1 is the lowest dollar amount, and 9 is the highest; if you don't want to use all the fields, enter 0 in the fields you don't want to use. For more information on this report, see the *DonorPerfect Reports* manual. The following graphic shows a sample of values you can enter:

Size Splits For Financial Reports (up to, but not including)								
1	100.00	2	500.00	3	1000.00			
4	5000.00	5	10000.00	6	15000.00			
7	20000.00	8	0.00	9	0.00			

- **Batch Processing Mode:** in DonorPerfect version 9, the Batch Processing feature was modified and renamed *Acknowledgment Processing*. The new

Acknowledgment Processing interface is broken into discrete, easy-to-follow steps, and you can create thank-you letters with the click of a button—without first going to your word processor. However, if you are more comfortable with Batch Processing from prior versions, you can make it your preferred mode by selecting **Pre-version 9 Batch Processing**. If version 9 Acknowledgment Processing is your preferred mode, or if you want easy access to both, select **Acknowledgment Processing**. You can always get to Batch Processing mode from within the Acknowledgment Processing interface by clicking the **Version 8 Options** button.

3. If you want to change your password, click the **Change Password** button.
4. In the **New Password** field, enter the new password.
5. In the **Enter Again** field, re-enter the new password.
6. When you're finished making changes, click **OK**.



## 4. Setting Up DonorPerfect Codes

### Overview

To make DonorPerfect more efficient and help ensure the consistency of your data, some of the fields you see on DonorPerfect screens are *coded*. For example, you probably use many different types of thank-you letters, and each is associated with a unique code for database processing: 01 for the Standard Thank You, 03 for the Capital Campaign Thank You, and so on. These codes are customizable. You can change the codes (and associated text) that you already have, add new ones as the need arises, and delete old ones you no longer need. The following sections explain how:

- “Adding Codes”—see page 41
- “Editing Codes”—see page 44
- “Inactivating Codes”—see page 45
- “Deleting Codes”—see page 45
- “Sample Codes for DonorPerfect Tables”—see page 45

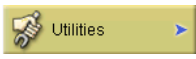
### Adding Codes

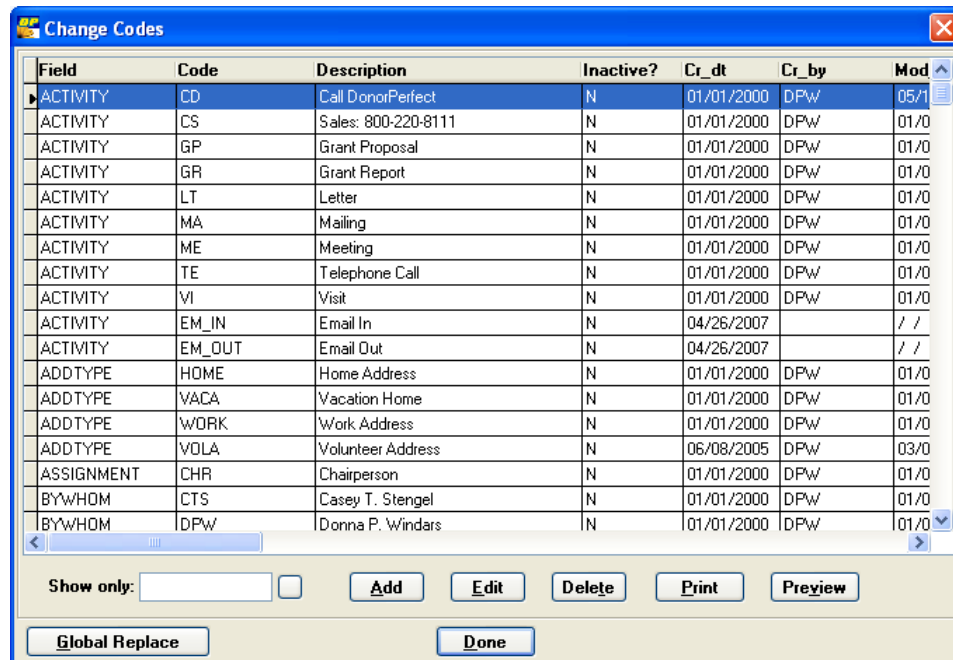
You may need to add codes to your system for reasons such as you are sending a new mailing and need to add a new SOL code, or you’ve started a new committee and need to add a new FLAG that can be assigned to committee members.



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

#### ► To add codes

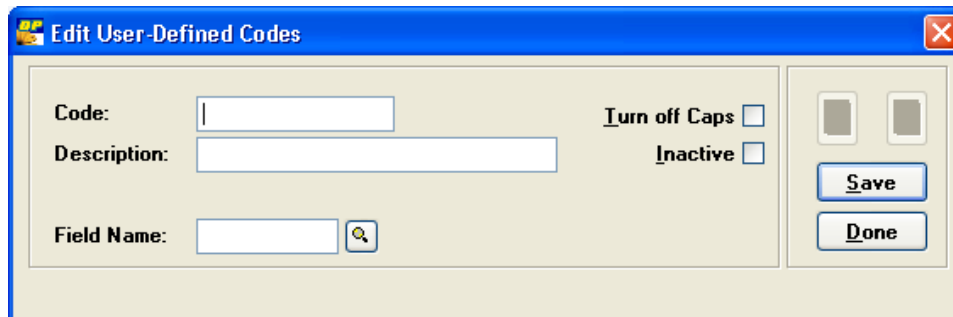
1. Click the **Utilities**  button and then select **Code Maintenance**. The **Change Codes** screen appears.



Field	Code	Description	Inactive?	Cr_dt	Cr_by	Mod
ACTIVITY	CD	Call DonorPerfect	N	01/01/2000	DPW	05/1
ACTIVITY	CS	Sales: 800-220-8111	N	01/01/2000	DPW	01/0
ACTIVITY	GP	Grant Proposal	N	01/01/2000	DPW	01/0
ACTIVITY	GR	Grant Report	N	01/01/2000	DPW	01/0
ACTIVITY	LT	Letter	N	01/01/2000	DPW	01/0
ACTIVITY	MA	Mailing	N	01/01/2000	DPW	01/0
ACTIVITY	ME	Meeting	N	01/01/2000	DPW	01/0
ACTIVITY	TE	Telephone Call	N	01/01/2000	DPW	01/0
ACTIVITY	VI	Visit	N	01/01/2000	DPW	01/0
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	01/0
ADDTYPE	VACA	Vacation Home	N	01/01/2000	DPW	01/0
ADDTYPE	WORK	Work Address	N	01/01/2000	DPW	01/0
ADDTYPE	VOLA	Volunteer Address	N	06/08/2005	DPW	03/0
ASSIGNMENT	CHR	Chairperson	N	01/01/2000	DPW	01/0
BYWHOM	CTS	Casey T. Stengel	N	01/01/2000	DPW	01/0
BYWHOM	DPW	Donna P. Windars	N	01/01/2000	DPW	01/0

Buttons: Show only:  Add Edit Delete Print Preview Global Replace Done

- Click **Add**. The **Edit User-Defined Codes** screen appears.



**Edit User-Defined Codes**

Code:  Turn off Caps

Description:  Inactive

Field Name:

- By default, DonorPerfect stores entered codes in all caps. This makes it easier for you to search and select for information in the database. However, you may want to set up fields that are not stored in all caps (for example, title - Mr., Mrs., Dr.; suffix - Phd, Jr., Sr., and so on). Select **Turn Off Caps** to have the ability to enter and store code information in uppercase and lowercase characters as you wish.
- Enter the desired code and description. The code is the actual data to be entered in the field. The description is the more complete or “friendly” version most often visible in reports, filters, and screens.
- In the **Field Name** field, enter the name of the field (for example, GL or SOL) for this code. To see a list of fields, click the magnifying glass  next to Field Name.
- If you selected one of the following fields, complete the additional information that appears at the bottom of the screen:
  - SOL (Solicitation Code):** the additional information is **Total Mailed, Printing Costs, Other Costs, Goal, and Date**; these fields appear on the Solicitation Analysis Report. You can auto-fill a Campaign code based on the Solicitation code. To do this, enter the Campaign code in the **Auto-Fill Campaign** field.

- **GL (General Ledger):** the additional information allows you to enter your accounting system's code (which is often different than the one used by DonorPerfect) in the **Account Code** field. The accounting code is used in the Accounting Interface Module (see page 268). For organizations using memberships, you can also set up the system to automatically update the membership category and expiration date for GL codes that are used for membership gifts; to do this, enter Y in the **Updates MCAT** field.
  - **MCAT (Membership Category):** the additional information allows you to enter each membership level's dollar range, which is used to auto-update the MCAT field. Enter the lower and upper limits of the dollar range in the **MCAT Low \$** and **MCAT High \$** amounts for each membership category. See the *DonorPerfect Administrator's Guide* for more information regarding automatic updating of membership categories and expiration dates.
  - **Link:** the additional information allows you to set the reciprocal link for this code. This sets the link so that when one name is linked to another name, the reciprocal link is automatically created. These links allow you to easily navigate between linked donors.
  - **TYLETTER (Thank-you Letter):** you can automatically complete the thank-you letter number for a gift record based on the information you enter in these additional fields. To set the criteria for the automatic calculation of the thank-you number, edit the desired TYLETTER code. Click the Set Criteria button, and set the criteria. The automatic assignment of TYLETTER is finished when the acknowledgment process is run and only affects gifts with nothing entered into TYLETTER.
7. If you need to add other codes, click **Save**.
  8. To exit, click **Done**. The **Change Codes** screen appears again.
  9. Click **Done**.

## Blank Codes and Descriptions

DonorPerfect allows you to enter both blank codes and blank descriptions, except for multi-coded fields, such as Flags, through the Code Maintenance section. Blank fields are useful if you need to erase the contents of a field, but you're not sure what value to assign. Remember that if you leave the description blank, the description for that code will display as blank in reports or screens where descriptions are used.


## Editing Codes

As you manage your fund-raising efforts, you may need to edit or update the codes used in your system.



**Note:** Editing a code through Code Maintenance does NOT change the code in an existing record. If you want to change code values for existing records, you must perform a global replace. For more information on globally replacing codes, see the *DonorPerfect Administrator's Guide*.

### ► To edit codes

1. Click the **Utilities**  button and then select **Code Maintenance**. The **Change Codes** screen appears.
2. Highlight the code you want to change, and double-click it or click **Edit**. The **Edit User-Defined Codes** dialog box appears.

The screenshot shows the 'Edit User-Defined Codes' dialog box. The title bar is blue with the text 'Edit User-Defined Codes' and a close button (X). The main area is light beige. It contains the following elements:

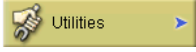
- Code:** A text box containing 'LUN'.
- Description:** A text box containing 'Unrestricted'.
- Field Name:** A text box containing 'GL' with a search icon to its right.
- Turn off Caps:** A checkbox that is currently unchecked.
- Inactive:** A checkbox that is currently unchecked.
- Navigation:** Two blue arrow buttons (left and right) and 'OK' and 'Cancel' buttons.
- Updates MCAT?:** A checkbox that is currently unchecked.
- MCAT #:** A text box.
- Account Code:** A text box.

3. Make your changes, and click **OK**.
4. If you want to edit other codes, press the left and right arrows to scroll through additional codes.
5. To exit, click **Done**. The **Change Codes** screen appears.
6. Click **Done**.

## Inactivating Codes

If you are no longer using a code, and you don't want it to appear on the F2 code list, you have the option to mark it as inactive. Use this feature if you have many old codes in your system (common problem with SOL codes), and you only want to see the current ones in the code list. Inactive codes continue to appear on reports if you're using a filter that includes them. You can temporarily view inactive codes in filters or on an entry screen by selecting the **Include Inactive?** check box.

### ► To inactivate a code

1. Click the **Utilities**  button and then select **Code Maintenance**. The **Change Codes** screen appears.
2. Highlight the code you want to make inactive, and double-click it or click **Edit**.
3. Select the **Inactive** check box, and then click **OK**.

## Deleting Codes

You may need to periodically delete codes from your system.




**Warning!** Do not delete codes unless you have run reports or filters to be certain that no data in the system uses the codes you want to delete.



**Note:** Deleting a code through Code Maintenance does NOT delete data in existing records.

### ► To delete a code

1. Click the **Utilities**  button and then select **Code Maintenance**. The **Change Codes** screen appears.
2. Highlight the code you want to remove, and click the **Delete** button. The following message appears: **Are you sure you want to delete this record?**
3. Click **Yes** to confirm.
4. Click **Done**.

## Sample Codes for DonorPerfect Tables

The following sections contain sample codes for the different tables in the system.



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

## Main Table

In the Main (**DB.DBF**) table, you can set up codes for flags and type of donor.

### Flags

Flags describe how a donor is associated with your organization. Flags are often used to filter which records in your system should receive a mailing. Records can have multiple flag codes. Sample flags are included below.



**Warning!** All your flag codes **must** be the same length.

<b>VOLT</b>	Volunteer	<b>STFF</b>	Staff
<b>NEWS</b>	Newsletter	<b>BDME</b>	Board Member
<b>PRSS</b>	Press	<b>FISC</b>	Fiscal Committee
<b>AUXI</b>	Auxiliary	<b>DECD</b>	Deceased Donor

### Type of Donor

The type of donor defines what type of entity the donor is. Sample donor types are listed below. These donor types must be mutually exclusive, because the donor, like all single-value fields, can only be assigned to one type.

<b>INDV</b>	Individual	<b>COMP</b>	Company
<b>FOUN</b>	Foundation	<b>ORGN</b>	Organization

## Gift Table

In the Gift (**DPGIFT.DBF**) table, you can set up codes for general ledger, solicitation, sub-solicitation, and type of gift.

### General Ledger Codes

GL codes define the account (fund) to which a gift is credited. Sample general ledger codes are listed below.

<b>UNRS</b>	Unrestricted	<b>BLFD</b>	Building Fund
<b>SCFD</b>	Scholarship Fund	<b>RSED</b>	Restricted - Education Fund

### Solicitation Codes

SOL codes define the event or mailing that generated a gift. Sample solicitation codes are listed below.

<b>M07A</b>	Mailing (1st of 2007)	<b>RENW</b>	Renewal Letter
<b>M07B</b>	Mailing (2nd of 2007)	<b>GT08</b>	Golf Tournament 2008
<b>N08A</b>	Newsletter (1st of 2008)	<b>MEML</b>	Memorial
<b>AB07</b>	Auction Ad Book 2007	<b>GRNT</b>	Grant Proposal
<b>AP07</b>	Auction Item Purchase 2007	<b>PERS</b>	Personal Solicitation
<b>AI07</b>	Auction Item In-kind 2007	<b>UNSO</b>	Unsolicited Gift
<b>AT07</b>	Auction Tickets 2007		

### Sub-Solicitation Codes

Sub-solicitation codes define the purpose of the gift; they further define the SOL codes and are primarily used for special events. They can also be used to define segments or individual lists in a mass mailing solicitation. Sample sub-solicitation codes are listed below.

Solicitation		Sub-Solicitation			
<b>BQ07</b>	Banquet 2007	<b>SPON</b>	Sponsorship	<b>TBPU</b>	Table Purchase
		<b>ADBK</b>	Ad Book	<b>INTK</b>	Individual Ticket Buyer

### Gift Type Codes

Gift type codes define the type of payment for gifts. Sample gift type codes are listed below.

<b>STCK</b>	Stock	<b>CRCD</b>	Credit Card
<b>INKD</b>	In-Kind	<b>RLES</b>	Real Estate
<b>CASH</b>	Cash	<b>CHCK</b>	Check

### Contact Management Table

In the Contact Management (DPOTHER2.DBF) table, you can set up codes for activities.

### Activity Codes

Activity codes define the contact management activities for your organization. Sample activity codes are listed below.

<b>LETT</b>	Write Letter	<b>MEET</b>	Meeting
<b>PHON</b>	Phone Call	<b>REPT</b>	Report Due

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blank.



# 5. Managing Donor Information

## Overview

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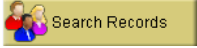
This chapter provides instructions on how to manage the donors in your system. In order to make the most of your fund-raising efforts, you'll want to track information about your donors, their addresses, their gifts, their pledges, and your interactions with them. DonorPerfect allows you to handle each of these tasks in your system. See the following sections for more information:

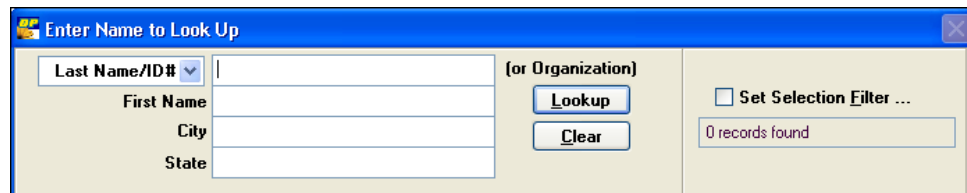
- “Searching for Donors”—see page 50
- “Maintaining Donor Information”—see page 53
- “Entering Additional Biographical Information About Donors”—see page 68
- “Maintaining Additional Addresses and Salutations”—see page 70
- “Maintaining Gift Information”—see page 76
- “Maintaining Pledge Information”—see page 91
- “Maintaining Other Information for Donors”—see page 105
- “Linking Records”—see page 108
- “Maintaining Contact Management Information”—see page 112
- “Integrating Contact Information with Outlook”—see page 115

## Searching for Donors

DonorPerfect gives you an easy and quick way to locate the donors that you need to find.

### ► To search for a record

1. Click the Search Records button . The Enter Name to Look Up screen appears.




2. Use one or more of the following lookup methods, and then enter the appropriate lookup criteria:
  - **Last Name/ID #** is the primary field used to look up records. This field allows you to search by last name for individuals, organization name for businesses, or ID number for any type of record. You can enter the entire Last Name or Organization name or only a portion of the name. The system will locate records that match or begin with the data entered.

You can use the pull-down next to **Last Name/ID #** to change the primary search from Last Name/ID # to one of five user-defined criteria (to set up the criteria, see “Defining Parameters” in the *DonorPerfect Administrator’s Guide*). Depending on how you define these fields, they may be from the Main (DP.DBF), Address (DPADD.DBF) or Phone (DPPHONE.DBF) tables. Email addresses are stored as phone records, so searching the phone table enables an email search, as well as a phone number search. You don’t need to enter the entire value, and the field is not case sensitive. If you’re looking up a record by phone number, parentheses and other punctuation must be entered too. For example, **(215)555-3322** and **(215)555** are both valid entries for a phone number search; **19044** and **19** are valid entries for a zip code search.

- **First Name:** this allows you to narrow the search for specific individuals by entering a first name in addition to a last name.
- **City, State (or user-definable field):** like the First Name field, the City and State fields allow you to narrow a search. If you enter a last name of Jones and a City and State, the system locates only those records in the specified City and State with the last name of Jones. The entire field does not need to be entered, and it is not case sensitive. Examples of valid entries are: **Horsham, Horsh, PA,** or **pa.** City and State are the defaults. You may change the two fields that appear on this screen for narrowing the search (to set up these fields, see “Defining Parameters” in the *DonorPerfect Administrator’s Guide*). The fields may be from the Main (DP.DBF) or Address (DPADD.DBF) databases.

- If you want to define a selection filter to look for donors, select the **Set Selection Filter** check box. Define the filter (you can select from either the Main or Address tables only), and click **OK** at the **Selection Verification Screen**. The filter stays in effect until the check box is no longer selected or when the entry session is closed. For details on building and setting filters, see page 118.



**Note:** To clear all lookup criteria, including any filters that are currently set, click the **Clear** button.

- Click the **Lookup** button, or press **ENTER**. The donors who meet the criteria you entered are listed at the bottom of the **Enter Name to Lookup** screen.

ID#	Name	Contact/Org. Name	Address	City, St Zip
16	\$ Mr. Roger Sandstone	Ms. Mary Smith	2522 N. Adams Court	Philadelphia
72	\$ Jason Schmidt	The Outdoorsman	1673 Webster Avenue	Lake Forest
104	\$ Mr. Richard Schwalm		5763 Valley Drive	Chicago IL
22	\$ Mr. William Seitz, Jr.		4694 Oak Street	Saint Bart Si
15	\$ Mr. Richard Seversen, III		1650 40th Avenue R. 2	Los Oswego
48	Mrs. William Shakespeare		123 Main Street	Hamilton ID
67	\$ The Shell Oil Company	Mr. John Rhodes	55 First Avenue	San Jose CA
13	\$ Mr. & Mrs. Harvey Smith, Jr.		4710 South Street	Hamilton SD
16	\$ Ms. Mary Smith		Cross-Ref to Mr. Roger Sandstone	Philadelphia
21	\$ Mr. & Mrs. Paul Smoyer		1974 24th Avenue	Bradsonville
63	\$ Dr. Ken Snyder		890 Katze Lane	Dortmore IL
18	\$ Mr. & Mrs. Edmund Soffer		2864 32nd Avenue	Elkins Park PA
46	\$ Software, Inc.	Mr. Frank Chudnow	540 Pennsylvania Avenue, #200	Fort Washing
105	\$ Arlen Specter		670 Oak Street	Harrisburg PA

Add Ind. Add Org. Edit Delete Done

- If more than 149 names were found that met the criteria and you want to see more than the first 149, click the **<click here for more records>** message at the end of the donor list. (This message only appears when more than 149 names are found.)
- Double-click anywhere in the row that contains the record you want to view. The **Main Donor Entry** screen appears. For example, the following Main Donor Entry screen appears if you double-click in the first row of the search results in the illustration above.

Mr. & Mrs. Roger Sandstone

[Main](#) | [Gift](#) | [Pledge](#) | [Other Info.](#) | [Link](#) | [Contact](#) | [Bio. 2](#) | [Addr/Sal](#)

**Last Name** Sandstone **Suffix**

**First Name** Roger **Title (Mr./Ms.)** Mr. & Mrs.

**Dear** Roger & Mary **Address Type** HOME

**Prof. Title**


**Optional Line**

**Address** 2522 N. Adams Court  HOME: (215)628-0400

**City, ST Zip** Philadelphia PA  19115-3309  WORK: (215)628-3209 ext 101

**Country**   Do Not Mail  Reason  FAX: (215)628-0585

**Spouse/Partner** Mary **Entry Date** 01/10/1998

**Flags** BD,PT,VL,DE,FC   **Last Update** 05/23/2007

**Record Type** Individual

**Donor Solicitor** Bronco L. Nagurski

**Last Mail Date** 06/01/2007

**Recent Mail** SM06,NL03,NL04.

**Potential** Up to \$9,999

**Web Site**



**Note:** When you return to the **Enter Name to Lookup** screen (by clicking **Done**), you will see the record you accessed listed at the bottom of the screen. As you continue accessing records, they are added to this list. At most, the last ten records you viewed will be listed. If you need to access one of these records again, simply double-click it.

## Maintaining Donor Information

DonorPerfect allows you to easily manage your donors and the relevant information about them. You can add, edit, and delete donors at any time.

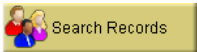
### Adding Donors

There are two types of donors records—individual or organization. The information you need to enter for each type of donor varies. See the following sections for details.

#### Adding Individual Donor Records


An individual donor is a donor who is not primarily affiliated with a company and who donates on his or her own to your organization. Individual donors may be linked to their employers, but in general, they contribute to your organization on their own and not through their companies.

#### ► To add an individual donor

1. Click the Search Records button . The Enter Name to Look Up screen appears.
2. Enter the donor's last name, or just the first part of it, in the **Last Name** field, and then click the **Lookup** button.



**Note:** Although you can leave the **Last Name** field blank, entering all or part of the last name helps prevent the creation of duplicates in your database, for instance, when you get a check from one member of a household who is already in your database as a "Mr. and Mrs."

3. If the donor isn't on the list that appears, click the **Add Ind.** button to add the donor to your database. The **Main** screen appears. (If the donor is on the list, double-click their name to update their record.)
4. Complete the following information related to the donor's name. If you entered any of the information on the **Enter Name to Look Up** screen, it will already be filled in.
  - **Last Name:** the last name of the donor. You can look up information about the person on the Internet by clicking the **Google** button .
  - **Suffix:** Ph.D., MD, Jr., III, and so on; prints as part of the full name (for example, John Smith, Ph.D.).
  - **First Name:** the first name of the donor.
  - **Dear:** the salutation line, which is used for mailings. You may leave this field blank if you want the donor addressed in the salutation as "Title + Last Name," or customize it to address a record informally.






**Note:** The value you enter in the Dear field determines the salutation in mailings. Dear is not included as part of the salutation—you'll need to type it in your letter. Here are some guidelines you should keep in mind:


If the Dear field has a value in it, each letter you create has the salutation of "[value in Dear field]." For example, "Roger and Mary."

If the Dear field is blank, each letter has the salutation of "Title+Last Name." For example, "Mr. Sandstone."

If the Dear field and the Title field are blank, each letter has the salutation of "First Name." For example, "Roger."

- **Title:** Mr., Ms., Mr. & Mrs., Dr., and so on; this prints on labels/letters as part of the full name (for example, Mr. & Mrs. John Smith).
- **Prof. Title:** the donor's professional title (for example, President, CEO). Use this field when you're sending mail to the donor's work address.

- **Optional Line:** this field is used to enter a secondary name or company name if sending mail to a donor's work address. The optional line entry will print above the address line on labels and envelopes
  - For a married donor whose spouse has a different last name, enter the spouse's complete name as you want it to appear on a mailing label.
  - For a donor's business address, use this line to identify the company.
- 5. Enter the following information for the donor's address:
  - **Address:** the donor's street address. You can look up the address on the Internet by clicking the **Map** button  or the **Whitepages** button .
  - **City, ST, Zip:** these fields represent the City, State, and Zip Code information for the donor. If you want to include a hyphen as part of the zip code, you should enter it as part of the zip code. You can look up the zip code on the Internet by clicking the **Binoculars** button .
  - **Address Type:** this is used to indicate whether the address is the home, work, or other type of address for the individual. For more information on address types, see page 61.
- 6. If the donor does not want to receive mail from your organization, select the **Do Not Mail** check box. If this is selected, the record will not be included in mailing labels or merge letters, but it will still be included in thank-you letter mail merge files. You can easily override this when running mailings by selecting the **Include NO MAIL records** check box in the mail merge process (see page 61 for more information).
- 7. If you've selected the **Do Not Mail** check box, you should enter the reason the donor does not want to receive mail in the **Reason** field.
- 8. The **Phone Number** pull-down or phone list box displays all phone numbers and email addresses for this record.

To add, edit, or display all numbers, click the phone icon , press CTRL+T, or double-click the list if you're using a phone list box. The Phone Type must be selected for each phone number you enter. You can enter phone numbers that are up to 40 characters, which gives you room to enter an extension or the name of the person who is attached to that number. If you wish to reorder the phone numbers, change the order number in the **Order** column; next time you view the phone list, the phone numbers will be reordered.

The **Mask** check box turns off any formatting for the number in that row. This check box is used for email addresses and non-standard numbers (for example, overseas). The DonorPerfect email functions (Mailings, Group Email, or the Send Email icon from the entry screen) identify email addresses based on all entries that have an @ in them.

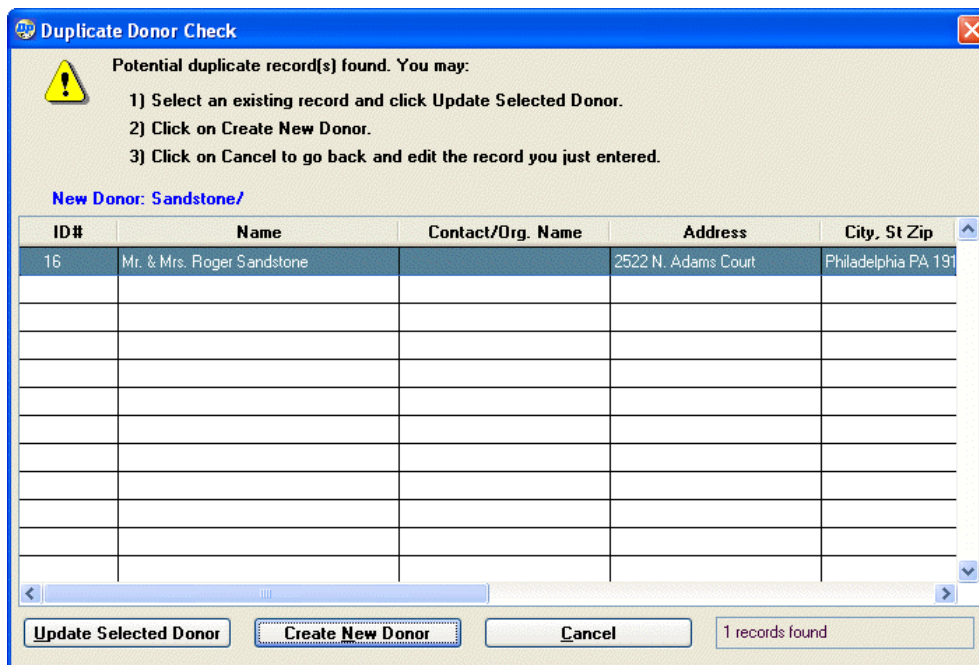
You can identify which member of a household a phone or email record belongs to. For information, see page 59.

9. Enter the following additional information for the donor:
  - **Record Type:** this is used to indicate the type of record (for example, Individual, Company, Organization, or Foundation) for this donor. A record can only have one type.
  - **Flags:** this field describes how a donor is associated with your organization. A donor’s Flags field can have multiple values. If you are typing codes into the Flags field, separate them with a comma and no space.
  - **Spouse/Partner:** optional field for first name of donor’s spouse or partner.
  - **Donor Solicitor:** the person at your organization who is primarily responsible for contacting or cultivating the donor.
10. To enter data on other entry screens, click the desired tab.
11. When you’re finished entering the information for the new donor, click **Done**.
  - If the information you entered **does not** closely match any existing records, a new donor record is created.
  - If the information you entered **does** closely match one or more existing records, the **Duplicate Donor Check** screen appears. See “Checking for Duplicate Records,” below, for details on this function.

**Checking for Duplicate Records**

The Duplicate Donor Check function screens the donor records you add to the system to make sure that you are not creating a duplicate of an existing record.

If the system detects that you have attempted to add a duplicate record, the Duplicate Donor Check screen appears:





The existing records that the system has matched to your new one are listed.

To resolve the situation, do one of the following:

- To update an existing donor record with the information that was entered in the new record, select the donor record from the list, and click the **Update Selected Donor** button. Information that was entered for the new record will overwrite the existing information for the selected record. Fields that were not filled out in the new record will be ignored.
- Click the **Create New Donor** record to create the new donor record anyway.
- Click the **Cancel** button to cancel the creation of the new record.

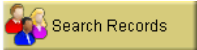


**Note:** To enable the Duplicate Donor Check function, check the **Check for duplicates when creating new donors?** option on the **General** tab of the Entry Screen Parameters screen. See "Defining Parameters" in the *DonorPerfect Administrator's Guide* for details.

## Adding Organization Donor Records

An organization or company donor is a donor where the contributor is the organization or company itself. These donors have individuals listed as contacts, but their contributions come from the organization and not from an individual person.


### ► To add organization or company donors

1. Click the Search Records button . The Enter Name to Look Up screen appears.

2. Enter the organization's name, or just the first part of it, in the **Last Name** field, and then click the **Lookup** button.






**Note:** Although you can leave the **Last Name** field blank, entering all or part of the organization's name helps prevent the creation of duplicates in your database. Including the word "The" as part of the organization name can also help.

3. If the organization isn't on the list that appears, click the **Add Org.** button to add the organization to your database. The **Main** screen appears. (If the donor is on the list, double-click their name to update their record.) The **Main** screen for organizations appears.
4. Complete the following information related to the organization's name and contact person:
  - **Org. Name:** the organization or company name. You can look up the company name on the Internet by clicking the **Google** button .
  - **Org. Prefix:** place the word The here if it is part of the organization's name.
  - **Contact:** the name of the organization's main contact, as it should appear on an envelope.
  - **Dear:** the salutation line.



**Note:** You **must** complete the **Dear** field for mail merges; otherwise, the salutation of the letter will be blank.

- **Prof. Title:** the professional title of the organization's main contact.
5. Complete the following address information for the organization:
    - **Address:** the organization's street address. You can look up the address on the Internet by clicking the **Map** button  or the **Whitepages** button .
    - **City, ST, Zip:** these fields represent the City, State, and Zip Code data for the record. If you want to include a hyphen as part of the zip code, you should enter it as part of the zip code. You can look up the zip code on the Internet by clicking the **Binoculars** button .
  6. If the organization does not want to receive mail from your organization, select the **Do Not Send Mail** check box. If this is selected, the record will not appear in mailing labels and merge letters, but the organization will still receive thank-you letters. You can easily override this when running mailings by selecting the **Include NO MAIL records** check box in the mail merge process (see page 168 for more information).

7. If you've selected the **Do Not Mail** check box, you should enter the reason the organization does not want to receive mail in the **Reason** field.
8. The **Phone Number** pull-down or phone list box displays all phone numbers or email addresses for this record.

To add, edit, or display all numbers, click the phone icon, press **CTRL+T**, or double-click the list if you're using a phone list box. The Phone Type must be selected for each phone number you enter. You can enter phone numbers that are up to 40 characters, which gives you room to enter an extension or the name of the person who is attached to that number. If you wish to reorder the phone numbers, change the order number in the Order column; next time you view the phone list, the phone numbers will be reordered.

The **Mask** check box affects the formatting for the number in that row. If it is selected, formatting is applied; if it is not selected, formatting is removed. This check box is used for email addresses and non-standard numbers (for example, overseas). The DonorPerfect email functions (Mailings, Group Email, or the Send Email icon from the entry screen ) use the email address based on all numbers that have an @ in them.

You can identify which contact at an organization a phone or email record belongs to. For information, see page 59.


9. Enter the following additional information for the donor:
  - **Flags:** this field describe how a donor is associated with your organization. A donor's Flags field can have multiple values.
  - **Record Type:** this is used to indicate whether the record is Individual, Company, Organization or Foundation. A record can only have one type.
  - **Donor Solicitor:** the person at your organization who is primarily responsible for contacting or cultivating the donor organization.
10. To access any other entry screen, select the tab heading.
11. When you're finished entering the donor's information, click **Done**.
  - If the information you entered **does not** closely match any existing records, a new donor record is created.
  - If the information you entered **does** closely match one or more existing records, the **Duplicate Donor Check** screen appears. See "Checking for Duplicate Records," page 56 for details on this function.

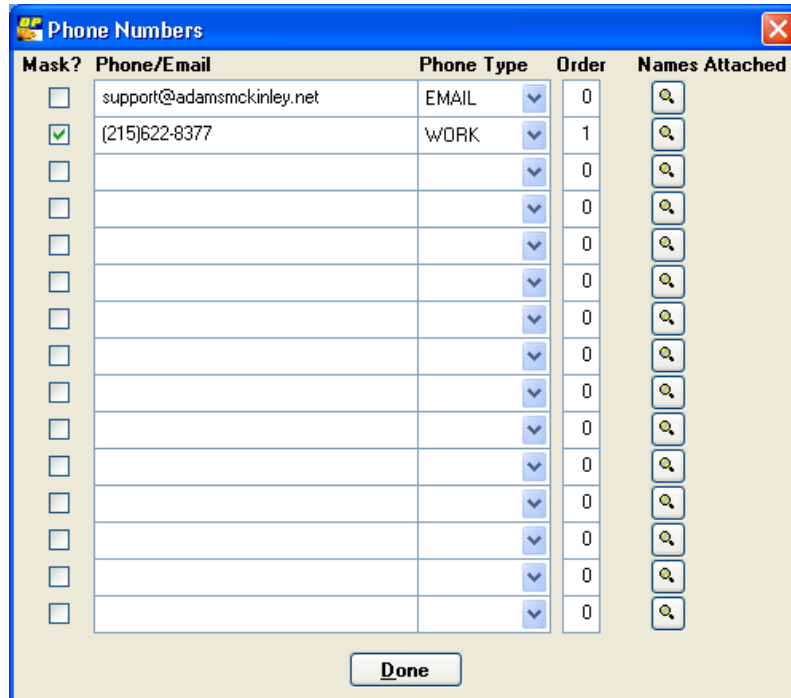
### ***Assigning Names to a Phone Number***


The Phone Numbers screen allows you to link an alternate name (or names) from a record's Address/Sal screen to a particular phone number. The word **\*Links** appears next to phone numbers that have names linked to them. Linking is useful in instances such as a family where the wife and husband each have their own salutation record, so that phone numbers can be linked to the right person. It can also be used with companies that have more than one contact,

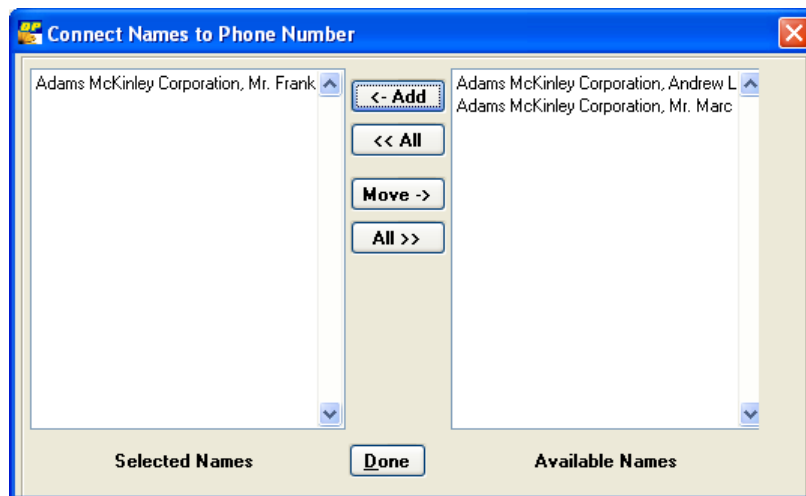
so each contact can be linked to their own phone number. It's also useful when you want to send a mailing to an alternate name's email address. Once a phone number has been linked to a name, it appears on the Address/Salutation screen for that record.

► **To link a phone number to a name**

1. Find the record for which you want to link a phone number to a name, and open it.
2. Click the phone icon , press CTRL+T, or double-click the phone list if you're using a phone list box. The **Phone Numbers** screen appears.



3. In the **Names Attached** column, click the magnifying glass icon  next to the phone number for which you want to link a name. The **Connect Names to Phone Number** screen appears.



- In the right column, highlight the name or names you want to link to, and then click the <-Add button.



**Note:** To remove a link to a phone number, highlight the name you want to link in the left column, and then click the **Move->** button.

- Click the **Done** button. In the **Names Attached** column on the right, next to the phone number you just linked, **\*Links** appears to indicate that a name has been attached.

Mask?	Phone/Email	Phone Type	Order	Names Attached
<input checked="" type="checkbox"/>	{upp}rt@damsckinley.net	EMAIL	0	
<input checked="" type="checkbox"/>	(215)622-8377	WORK	1	* Links

- Click **Done** to return to the donor's record.

### Various Types of Addresses

DonorPerfect can accommodate the needs of specific donors and the preferences of your organization by allowing flexible address options:

- Standard letter address block
- Formal address
- Informal address
- Address for couple
- Business address for individual
- Company address

The following sections show various ways to enter addresses on the **Main Entry** screen along with how each address will appear on a mailing label. The salutation for the mail merge letter is also displayed.




**Note:** If the salutation field is left blank, donors are addressed as Title + Last Name as long as there is something in the Title field. If there is nothing in the Title field, it defaults to the First Name field.

### Standard Letter Address Block

The standard letter address block on labels and in mail merges is as follows:

TITLEFNAME LNAME SUFFIX  
 PROFESSIONAL TITLE  
 OPTIONAL LINE  
 ADDRESS

CITY, ST ZIP

 **Note:** There should be no space between TITLE and FNAME, as shown above.

*Formal Address*

The following graphic shows how you would enter a formal address for a record:

The screenshot shows a contact record for Mr. & Mrs. Roger Sandstone. The form includes the following fields and values:

- Last Name: Sandstone
- First Name: Roger
- Title (Mr./Ms.): Mr. & Mrs.
- Address: 2522 N. Adams Court
- City, ST Zip: Philadelphia PA 19115-3309
- Address Type: HOME
- Contact Information: HOME: (215)628-0400, WORK: (215)628-3209 ext 101, FAX: (215)628-0585, CELL: (215)628-4343, EMAIL: rogers@sandstone.com

The address and salutation would appear as follows for this record:

Mr. & Mrs. Roger Sandstone  
 2522 N. Adams Ct.  
 Philadelphia, PA 19115-3309  
 Dear Mr. & Mrs. Sandstone,

The **Dear** field is left blank, so the default of **Title + Last Name** appears as the salutation. If there is a **Spouse** field, fill it in. The Spouse field is for informational purposes only, as the spouse’s name does not display in the address or salutation.

*Informal Address*

The following graphic shows how you would enter an informal address for a record:

The screenshot shows a contact record for Mr. & Mrs. Roger Sandstone. The form includes the following fields and values:

- Last Name: Sandstone
- First Name: Roger & Mary
- Title (Mr./Ms.):
- Address: 2522 N. Adams Court
- City, ST Zip: Philadelphia PA 19115-3309
- Address Type: HOME
- Contact Information: HOME: (215)628-0400, WORK: (215)628-3209 ext 101, FAX: (215)628-0585, CELL: (215)628-4343, EMAIL: rogers@sandstone.com

The address and salutation would appear as follows for this record:

Roger & Mary Sandstone  
 2522 N. Adams Ct.  
 Philadelphia, PA 19115-3309

Dear Roger & Mary,

If there is a **Spouse** field, you won't need to enter it, because his or her name is already displayed in the First Name field. **Dear** is left blank because it defaults to the **First Name** field because there is nothing in the **Title** field.

### *Address to a couple with two different last names*

The following graphic shows how you would enter an address to a couple with two different last names:

Figure 5-1 Sample Address to Couple with Two Different Last Names

The address and salutation would appear as follows for this record:

Mr. Roger Sandstone

Ms. Mary Smith


2522 N. Adams Ct.

Philadelphia, PA 19115-3309

Dear Roger & Mary,

To set up this record, enter the spouse's name (and title, if necessary) in the **Optional Line** field on the Main entry screen.



**Note:** If you want to be able to look up this record by either the husband's or wife's name, click the **Cross Reference** icon . You will be asked if this is an organizational name; click **No**, and a cross reference is automatically created. In this example, a cross reference is created for **Ms. Mary Smith**, which allows you to look up this record by either *Roger Sandstone* or *Mary Smith*. As shown above, with this setup, the address will show both names for the couple. (For more on the Cross Reference tool, see page 19.)

### *Business address for an individual*

The following graphic shows how you would enter a business address for an individual:

Mr. Fred Garvin

Main Gift Pledge Other Info. Link Contact Bio. 2 Addr/Sal

Last Name: Garvin Suffix: [Search]

First Name: Fred Title (Mr./Ms.): Mr. [Search]

Dear: [Search] Address Type: WORK [Search]

Prof. Title: Executive Director

Optional Line: Pro Cycling Foundation

Address: 1231 Maryland Avenue NE #1001

City, ST Zip: New York NY 20002-5335 [Search]

Country: [Search]

Do Not Mail [ ] Reason [Search]

HOME: (212)354-6245  
 WORK: (215)352-9504  
 CELL: (212)354-6244  
 EMAIL: Fred@Garven.com

The address and salutation would appear as follows for this record:

Mr. Fred Garvin  
 Executive Director  
 Pro Cycling Foundation  
 1231 Maryland Avenue NE #1001  
 New York, NY 20002-5335  
 Dear Mr. Garvin:

In this example, Fred Garvin is the individual donor who has requested that his mail be sent to his business address.

*Company address (with a contact person)*

The following graphic shows how you would enter a company address with a contact person:

Adams McKinley Corporation

Main Gift Pledge Other Info. Link Contact Bio. 2 Addr/Sal

Org. Name: Adams McKinley Corporation Org. Prefix: The

Contact: Mr. Andrew Lockley

Dear: Mr. Lockley

Prof. Title: CEO

Address: 477 W. Virginia Drive

City, ST Zip: Philadelphia PA 19011 [Search]

Country: [Search]

Do Not Send Mail [ ] Reason [Search]

WORK: (215)622-8377  
 EMAIL: support@adamsmckinley


The address and salutation would appear as follows for this record:

Mr. Andrew Lockley  
 CEO  
 The Adams McKinley Corporation  
 477 Virginia Drive  
 Philadelphia, PA 19011  
 Dear Mr. Lockley:

In this case, Adams McKinley Corporation is the donor and Andrew Lockley is the contact. To set up this record, click the **Add Org.** button instead of **Add Ind.** when the record is created. This activates the Organization Entry screen formatted specifically for businesses and organizations.





**Note:** If you want to be able to look up this record by either the company name or the contact person's name, click the **Cross Reference** icon . You will be asked if this contact is an organizational name; click **No**, and a cross reference is automatically created. In this example, a cross reference is created for **Mr. Andrew Lockley**, which allows you to look up this record by either *Adams McKinley Corporation* or *Andrew Lockley*. As shown above, with this setup, the address will show both the contact person's name and the company name. (For more on the Cross Reference tool, see page 19.)



**Note:** To change an individual-type record to an organizational-type record, click on the check box "Organizational Record" (usually on **Bio. 2** screen). To change to an individual-type record, clear this check box; when you make this change, you may need to adjust the data on the Main screen for the donor.

## Editing Donors

As you manage your donor information, you'll need to update donors' names, addresses, or other information from time to time.

### ► To edit a donor record

1. Find the donor record you want to edit, and double-click it. The record appears.
2. Make the necessary changes to the record.
3. Click the **Done** button.

## Deleting Donors

Deleting donors is quick and easy. Please keep in mind that when you delete a donor from the system, you can no longer access their information, including gift, pledge, and any other information. If you decide that you don't want to remove the donor from your system, you can restore the deleted record (see the next section for details).


### ► To delete a donor

1. Find the donor record you want to delete.
2. Highlight the record, and click the **Delete** button.

The following warning message appears:

This will delete all data for this record. To delete the cross reference only, delete it from the Address/Sal screen.

3. Do one of the following:
  - To delete the donor record, click **OK** and then click **Yes** to confirm the deletion.



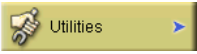
**Warning!** While you have the ability to restore deleted records in most cases, be sure that you want to delete a record before confirming the deletion.

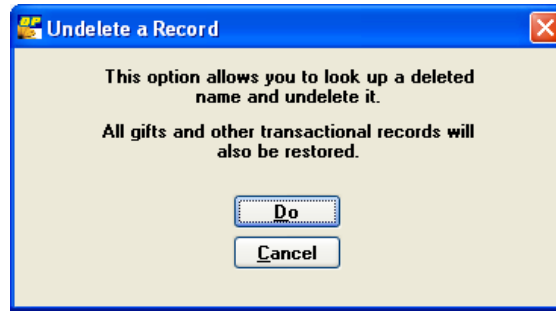
- To delete the cross reference only, see “Deleting an Address or Salutation” on page 75.

### Restoring Deleted Records

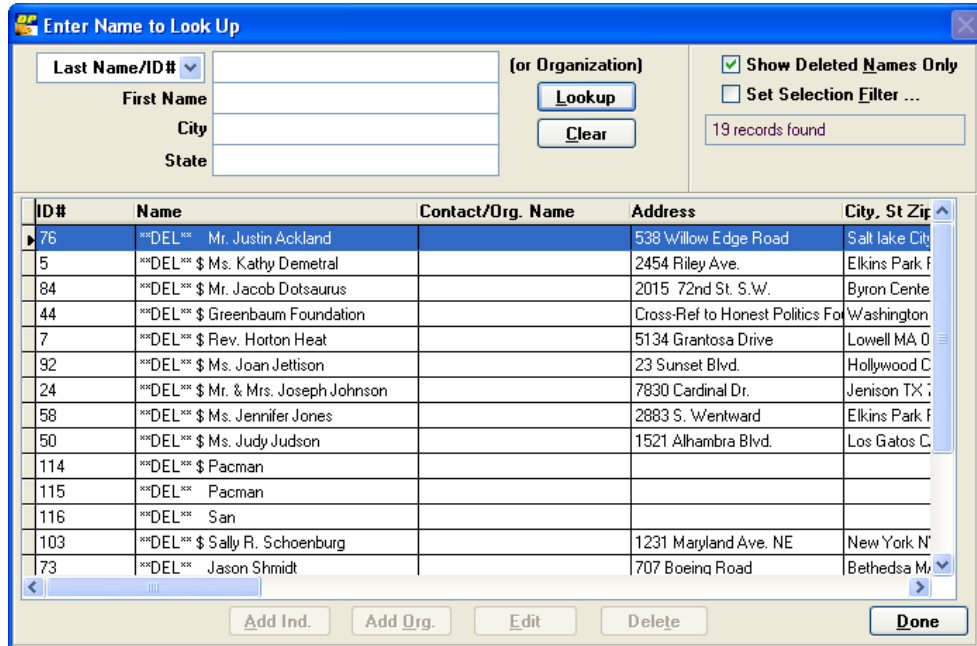
This option allows you to restore a record that has been deleted.

► **To restore a deleted record**

1. Click the **Utilities** button , and then click **Restore Deleted Record**. The **Undelete a Record** screen appears.



2. Click **Do**. The **Enter Name to Lookup** screen appears.
3. If you want it to only show names that have been deleted, select the **Show Deleted Names Only** check box. For clients with large databases, selecting this check box may slow down the lookup process.



4. To set a selection filter, select the **Set Selection Filter** check box. Define the filter, and click **OK** at the Selection Verification Screen. For more information on setting up selection filters, see page 118.
5. Find the record you want to restore, and then double-click the record. A message appears, telling you the record will be restored
6. Click **Yes**. The **Undelete a Record** screen appears again.
7. Click **Do**.



**Note:** Records may be permanently deleted from the system by using the “Global Deletion” with the “pack records” option in the Flexible Information Generator. See “Globally Deleting Records” in the *DonorPerfect Administrator’s Guide*.

## Entering Additional Biographical Information About Donors

The **Bio. 2** screen shows additional fields from the Main (DP.DBF) table in which you can enter other information about your donors. Examples of items on this entry screen are capital campaign information, major donor research, volunteer planning, or membership status. You have the option to add up to 9 sub-screens to this screen. The pull-down displayed in the top right corner allows you to navigate among the sub-screens. For information on how to set up the Bio. 2 screen, see “Customizing Screens & Tables” in the *DonorPerfect Administrator’s Guide*.

The following graphics show three different examples of a Bio. 2 screen.

**Mr. & Mrs. Roger Sandstone**

Main | Gift | Pledge | Other Info. | Link | Contact | **Bio. 2** | Addr/Sal

--- PERSONAL INFORMATION --- Personal-Major Donor

Employer: Adams McKinley Corporation      Matching Gifts Program?  Y

Occupation: Banking

--- MEMBERSHIP ---

Membership Type: Presidential      Expiration Date: 09/01/2005

Up/Down From: Milestone      Initial Date: 09/01/1990

--- CAPITAL CAMPAIGN / MAJOR DONOR ---

Income Level: \$150,000 - \$249,000      Donor Interests: ED,PE,DR

Potential Pledge: 1000.00      Gift Types: PL,ST,CR

Cultivation Status: Visit Completed      Prospect Rating: High Priority

Board Contact: Casey T. Stengel      Staff Contact: Edward L. Pearson

Cancel      Done

**Mr. Roger Sandstone**

Main | Gift | Pledge | Other Info. | Link | Contact | **Bio. 2** | Addr/Sal

--- VOLUNTEER PLANNING --- Volunteer Planning

Skills: CO,SO      Training Date: / /

Language(s):      Orientation Date: / /

Volunteer Interests:      Volunteer Birthdate: / /

Availability: SATM      Total Volunteer Hours: 12

--- CAPITAL CAMPAIGN VOLUNTEERS ---

Campaign Committee:      Campaign Team:      Committee Type:      Team Type:

Comments:

Cancel      Done

Mr. & Mrs. Roger Sandstone

Main Gift Pledge Other Info. Link Contact **Bio. 2** Addr/Sal

--- PLANNED GIVING INFORMATION --- Planned Giving-Prop

Assets 100,000,000

Durable Power of Attorney

Durable Power Date 03/01/2002

Estate Plan

Attorney Roy Bean

Attorney Phone (215)628-4343

Executor Gill Thrope

Executor Phone (215)223-7723

--- PROSPECT RESEARCH INFO ---

Estimated Household Income \$85,001 to \$90,000

Marital Status Married

Number of People in Household 3

Number of Adults in Household 2

Children in Household? Y

Household has Credit Card? Y

Head of Household Age 52

Donor Age 52

Own or Rent Residence? Home owner

Dwelling Type Single-Family Unit

Number of Years at Residence 19

Data Valid as of 08/09/2002

Cancel

Done

► **To enter additional information**

1. Find the donor record for which you want to enter additional information, and double-click it. The record appears.
2. Click the **Bio. 2** tab.
3. Enter the information you've chosen to include on this tab.
4. To access another Bio2 sub-screen, select it from the pull-down menu.
5. When you've entered all the information for the donor, click **Done**.

## Maintaining Additional Addresses and Salutations

The **Address/Salutation** entry screen allows you to enter additional addresses and/or salutations for donors. From this screen, you can designate the type of mailings a specific alternative address is to receive. This allows you to send mail to a specific member of a household and still maintain the primary record as the couple, company, or family (for instance, for board, staff, or volunteer mailings).


### Adding Another Address or Salutation

If you need to add additional address or salutation, DonorPerfect allows you to easily do that.

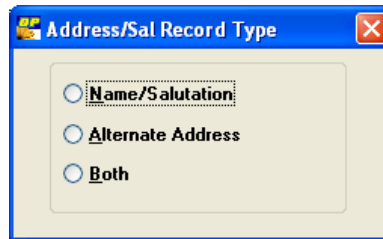
► **To add another address or salutation**

1. Find the donor record for which you want to add another address or salutation, and double-click it. The record appears.
2. Click the Addr/Sal tab. The Initial Address/Salutation Lookup screen appears.

Priority	Title	First Name	Last Name/Org	Contact	Address
PRIM	Mr. &	Roger	Sandstone		446 Sea Spray Terrace
ALT	Mr. &	Roger	Sandstone		2522 N. Adams Court
ALT	Mr.	Roger	Sandstone	Adams McKinley Corpo	477 W. Virginia Drive
ALT	Mrs.	Mary	Williams Sandstone		2522 N. Adams Court

 **Note:** In the **Priority** column, **PRIM** designates the primary address entered on the Main Entry screen. Alternative Addresses are only available for use with mailing labels and mail merge files. The primary address is the address that always shows on reports.

3. Click **Add**. The **Address/Sal Record Type** dialog box appears.



4. Choose the type of address/salutation you are adding:
- **Name/Salutation:** name and salutation are different from the primary entry but the address is the same.
  - **Alternate Address:** address is different from the primary address but the name and salutation is same as that on the Main screen.
  - **Both:** both the name and address are different than the primary entry.

A new entry is created in the next available row. Some of the fields are filled in, depending on what you selected in the previous step.

5. Double-click the row that contains the new entry.

The Address/Salutation Entry screen appears.

The screenshot shows the 'Address/Salutation Entry' screen for 'Mr. Roger Sandstone'. The interface includes a navigation bar with tabs: Main, Gift, Pledge, Other Info, Link, Contact, Bio. 2, and Addr/Sal. The main form contains the following fields and options:


- Name Fields:** Last Name (Sandstone), First Name (Roger), Suffix, Title (Mr/Ms) (Mr.), Dear (Roger & Mary), Prof. Title, Optional Ln.
- Address Fields:** Address, City, ST Zip, Country, Address Type (pull-down menu).
- Mailing Options:** Mailing Codes, Date Range (From / To /), Mailings to Receive (radio buttons: Every Mailing, Selected Mailcodes, No Mailings, All Others).
- Lookup Options:**
  - Lookup By?
  - Use Name from Main
  - Use Address from Main Screen
  - Primary Address
- Buttons:** Cancel, Done.

6. Enter the name and address information.
7. From the **Address Type** pull-down, select the type of address (for example, Home, Work, or Vacation).
8. Complete the following information:
- **Lookup By:** select this check box to include this record in your search when you look up the main record. For example, in **Error! Reference source not found.**

on page **Error! Bookmark not defined.**, the alternate address is for Mary Sandstone, but the main record is for Roger & Mary Sandstone. When this box is checked, and you type in Sandstone on the Lookup screen, both the Roger & Mary Sandstone and Mary Sandstone records will appear.

- **Use Name from Main:** select this check box to use the name from the Main entry screen; if you select this, do not enter a name on this screen. Future edits to the main screen will carry over to this record.
  - **Use Address from Main Screen:** select this check box to use the address from the Main entry screen; if you select this, do not enter an address on this screen. Future edits to the main screen will carry over to this record.
  - **Primary Address:** if this check box is selected, this address becomes the primary address displayed on the Main entry screen. You are asked to verify that you want this address to be the primary address.
9. On the lower right side of the screen, choose the mailings you want this name/address to receive. Primary addresses are typically marked **All Others**.



- **Every Mailing:** allows this address to receive all mail, regardless of whether the “Choose Alternate Name/Address” option is used when running the mailing. Use this to duplicate mailings to be sent to the primary address. Use this to duplicate mailings being sent to the primary address.
  - **Selected Mailcodes:** this option is used along with the “Choose Alternate Name/Address” option (see page 168 for more information) when running mailings. Enter the specific mail code or codes that will trigger use of this address in a mailing. This code is used on the Listing and Mailings screen (see page 160 for more information), to specify which to include in a mailing.
  - **No Mailings:** prevents this alternate address from receiving any mailings.
  - **All Others:** This address will be used when the “Choose Alternate Name/Address” option is selected for a mailing and no other addresses for the record have the selected mailing codes. This is the default option for all addresses and the correct selection for the primary address.
10. When you’ve defined how the additional address or salutation should be used, complete the following information:
- **Mailing Codes:** enter mail codes (or choose them by clicking the magnifying glass ) for the specific types of mail this alternative address should receive. Mail codes must be entered if **Selected Mailcodes** is chosen for this address/salutation (see description in previous step).
  - **Date Range:** use this for seasonal addresses; enter the beginning (**date1**) and ending dates (**date2**) in MM/DD format in **both the Main Address (Primary**



**Address**) and the **Alternative Address (Seasonal Address)**. This option also allows you to use the selected mail codes function for addressing the donor differently. (For instructions on mailing to alternate addresses, see page 168.) The program will use the appropriate address for mailings and labels, but reports will consistently use the primary address.

11. To access any other entry screen, select the tab heading.
12. When you are finished entering all information, click **Done**.

### **Example: Addressing and Mailing to One Person of a Married Couple**

When you have donors who are married, often the Main tab for their records shows the name of the couple. This can be problematic when you need to send mail to only one person in a married couple. For instance, your board member is Mary Sandstone, but the donor record is set up for Mr. and Mrs. Roger Sandstone because she donates with her husband. You can add an alternate address/salutation to solve this issue.

#### ► **To set up mailings and labels addressed to only one person in a couple**

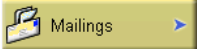
1. Add a record to the **Addr/Sal** screen using the **Name/Salutation** option.
2. Enter the name and salutation for the person to whom you want to send the mailing and the mailing code used for mailings you want the person to receive (for example, “BD” for “Board Member”).
3. Select the **Use Address From Main Screen** check box, and do not enter an address on this screen (it will automatically be filled in).

The screenshot shows the 'Addr/Sal' screen for Mr. Roger Sandstone. The interface includes the following elements:

- Tabs:** Main, Gift, Pledge, Other Info, Link, Contact, Bio. 2, Addr/Sal.
- Fields:**
  - Last Name: Sandstone
  - First Name: Mary
  - Title (Mr/Ms): Mrs.
  - Prof. Title: Manager
  - Optional Ln.: UNICEF Greeting Cards
  - Address: (empty)
  - City, ST, Zip: (empty)
  - Country: (empty)
  - Address Type: (dropdown menu)
  - Mailing Codes: BD
  - Date Range: From / To (empty)
  - Mailings to Receive: Selected Mailcodes (radio button selected)
- Checkboxes:**
  - Lookup By?
  - Use Name from Main
  - Use Address from Main Screen
  - Primary Address
- Buttons:** Cancel, Done

4. Click **Done**.

► **To send a mailing to the alternative address**

1. Click the **Mailings** button  and then click **MailMerge**. The **Listings and Mailings** screen appears.
2. Select the **Choose Alternate Name/Address** check box. The **Choose a Code for the Mailing Codes (MAILCODES)** field appears.
3. On the right, double-click the mailing code that the mailing for which you want to use an alternative address, and then click **Done**.
4. Make your other selections for the mailing, and click **Do**. The alternative address is used for donors where applicable; otherwise, the primary address will be used.

For more information on sending mail to alternate addresses, see page 168.

## Editing Another Address or Salutation

In order to edit another address or salutation, you'll need to choose which address/salutation you want to edit.

### ► To edit another address or salutation

1. Find the donor record you want to edit, and double-click it. The record appears.
2. Click the **Addr/Sal** tab. The **Initial Address/Salutation Lookup** screen appears, showing address and salutation information in several columns across the screen.



**Note:** To sort the list by a specific column (for example, Priority or Last Name/Org) in ascending order, click the column heading. To sort the column in descending order, click the column heading again.

3. Highlight the address or salutation record you want to modify, and click the **Edit** button. The **Address/Salutation Entry** screen appears for the record you selected.
4. Make the necessary changes, and then click the **Done** button.

## Deleting an Address or Salutation

When you delete an address or salutation, it is no longer available to use for mailings. Please be sure you want to delete the address or salutation before doing so.



**Note:** If you want to delete the primary address for a record and enter a new address, simply change it on the Main tab for the record.

### ► To delete an address or salutation

1. Find the donor record you want to edit, and double-click it. The record appears.
2. Click the Addr/Sal tab. The Initial Address/Salutation Lookup screen appears.
3. Click the address to be deleted, and click the **Delete** button. The following message appears: **Are you sure you want to delete this record?**
4. Click **Yes**.

## Maintaining Gift Information

The Gift tab is used to record all donor gifts including cash, check, stock, in-kind, matching, and memorial gifts. You can also record soft credits for donors who are to be recognized for their part in generating contributions.

### Adding Gifts

The **Gift Entry** screen, like all other DonorPerfect entry screens, can be modified to meet your organization’s individual needs. Therefore, the fields, graphics, and instructions in this section may not match the layout used by your organization. The pull-down in the upper right corner allows for access to additional sub-screens within this entry screen. Some of the fields listed below may appear on these sub-screens.



**Note:** You can enter a donor’s gifts in any order. DonorPerfect automatically sorts each entry in reverse chronological order (newest to oldest) for display and reporting purposes. When adding new gifts, default values may display in some fields when you first enter the **Gift Entry** screen. For more information on setting up default values, see page 29.

► **To add a gift**

1. Find the donor record you want to edit, and double-click it. The record appears.
2. Click the **Gift** tab. The **Initial Gift Lookup** screen appears.

Date	Amount	Record Type	General Ledger	Solicitation	Type of Gift	Plg	Pmt	Tylette
06/01/2007	500.00	Gift	Disaster Relief	BQ06	Check			10
06/08/2005	500.00	Gift	Unrestricted	BQ05	Check			10
06/01/2005	100.00	Gift	Building Fund	BD05	Check	P		02
05/15/2005	100.00	Gift	Building Fund	BD05	Check		P	03
04/15/2005	100.00	Gift	Building Fund	BD05	Check		P	03
03/15/2005	100.00	Gift	Building Fund	BD05	Check		P	03
06/21/2004	500.00	Gift	Restricted-Educ	BQ04	Check			03
05/20/2004	600.00	Gift	Membership	UNSO	Check			09
04/01/2004	100.00	Gift	Unrestricted	BQ04	Check		P	03
05/02/2003	500.00	Gift	Membership	MEMB	Check			02
03/12/2003	250.00	Gift	Building Fund	UNSO	Check			02
08/07/2002	100.00	Gift	Disaster Relief	BQ02	Check		P	02
07/11/2002	100.00	Gift	Disaster Relief	BQ02	Check		P	03
03/21/2002	1500.00	Soft Credi	Unrestricted	BQ00	Soft Credit			99
02/13/2002	1500.00	Gift	Unrestricted	BD00	Check			02
01/15/2002	80.00	Gift	Unrestricted	MEMR	Check			01
10/15/2001	200.00	Gift	Unrestricted	SM01	Check			01
09/02/2001	1000.00	Gift	Restricted-Educ	MEMR	Check			01

3. Click **Add**. The **Gift Entry** screen appears.



**Note:** If the current donor has outstanding pledges, you will be prompted to apply the gift towards a pledge. See “Prompt to Apply a Gift to an Outstanding Pledge”, page 79

4. Complete the following information about the gift:
- **Date of Gift:** the date defaults to the current system date, but you can enter a different date for the gift. This field is commonly used to represent the check or entry date.
  - **Amount of Gift:** the amount of the contribution.
  - **Reference:** the reference field is used to store data relevant to the transaction. The most common use is for tracking check numbers or credit card numbers.
  - **Thank You Letter:** Enter the number of the thank-you letter the donor should receive for this gift.
  - **General Ledger:** this field tracks the fund or general ledger account to which the gift will be credited. For example, UN for Unrestricted, BF for Building Fund, SF for Scholarship Fund, or ED for Restricted - Education Fund.
  - **Solicitation:** this field tracks what solicitation or media is responsible for generating the gift. For example, SPRING07 for Spring Mailing 2007, GALA07 for an annual event.
  - **Sub-Solicitation:** this field further differentiates the solicitation method. For instance, the solicitation code may show that the gift is for the annual dinner. The sub-solicitation is used for coding the purpose of the gift (for example, sponsorship, table purchase, or auction item donation). For example, SPON for

Sponsorship, TAPR for Table Purchase, ADBK for Ad Book, or TIBY for Ticket Buyer.

- **Type of Gift:** the gift type field is used to record the payment form of the gift (for example, cash, in-kind, stock, or checks). For example, CC for Credit Card, IK for In-Kind, RE for Real Estate, or CK for Check.
  - **Mem/Hon:** this field tracks whether the gift is given in memory or in honor of an individual. The person for whom the gift was given in memory or in honor of is entered into the First Name and Last Name fields (see below).
  - **First Name:** the first name of the person in whose honor or memory the gift was made. This field is also used to track a guest's first name for an event (see "Special Events Reports" in the *DonorPerfect Reports* manual for more information).
  - **Last Name:** the last name of the person in whose honor or memory the gift was made. This field is also used to track a guest's last name for an event (see "Special Events Reports" in the *DonorPerfect Reports* manual for more information).
  - **Gift Notes:** this field may hold an in-kind gift description, special instructions for processing the gift, or other information regarding the gift.
  - **Fair Market Value:** this field is used for tracking the non-deductible portion of a contribution. It's used for events where a part of the donation is not tax deductible, or if goods and services are being received in exchange for the gift. This field is also used for tracking the value of an in-kind gift. Money entered does not show in financial reports and does not affect the donor's giving totals.
  - **Link Name to Gift:** this button links another donor record to the current gift as a Soft Credit, Notification, or Matching Gift Link. For details, see page 80.
  - **Batch Number:** the batch number is automatically assigned during Acknowledgment Processing. For details, see page 187.
  - **Receipt/Gift ID Number:** this is a unique number that is assigned to each gift. If your receipts must print a unique number, you can use this field (**gidnumb**) to print on the receipt.
  - **Campaign:** this optional field can be automatically filled based on the entry in Solicitation or General Ledger. For instance, if there is an annual campaign code of AN08 made up of 3 different solicitations (for example, mailing, phonathon, and dinner), you can set the campaign field to automatically fill with AN08 whenever one of those solicitations is entered in a gift. For more information on how to set this up, see page 41.
  - **Gift Solicitor:** the person in your organization credited with bringing in the gift.
  - **Thank You Address:** the address to which this thank-you letter should be mailed.
5. View the following show-only fields if applicable to the gift:

- **Pledge Payment:** this check box is initially set to be dimmed and will automatically fill if you click on *Apply Payment* from the Pledge screen.
  - **Split Gift:** this check box is also set to be dimmed and will automatically be selected when you split a gift (see next section).
6. To access any other entry screen, select the tab heading.
  7. When you are finished entering all information for the record, click **Done**.

### Prompt to Apply a Gift to an Outstanding Pledge

If the donor has any open pledges in the system, when you add a new gift you will automatically see the List of Pledges screen. This screen allows you to immediately apply the gift towards one of the outstanding pledges.


Date	Pledge ID	Total	Balance	Billing Amount	General Ledger	Solicitation
07/18/2008	965	\$500.00	\$500.00	\$100.00	Building Fund	Unsolicited
07/18/2008	968	\$2,000.00	\$2,000.00	\$250.00	Unrestricted	Unsolicited

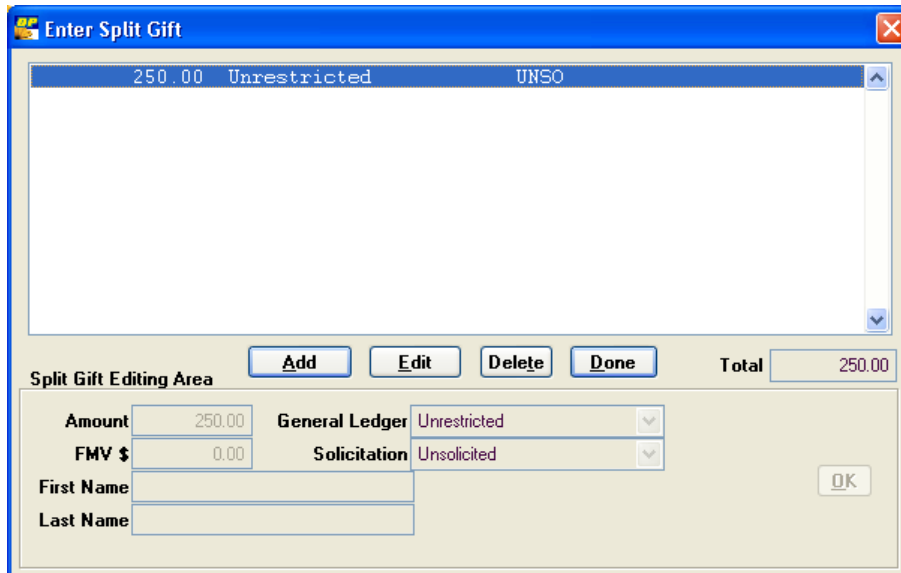
- ▶ **To add the gift without applying it towards a pledge**
  1. Click the **New Gift** button. The Gift Entry screen will appear and you can enter the gift as you normally would. See “Adding Gifts” page 76 for details.
- ▶ **To apply the gift towards a pledge**
  1. Select a pledge from the list.
  2. Click the **Apply Payment** button. The Gift Entry screen will open, and the billing amount and other details from the pledge will be entered for the new gift by default. Finish adding the gift as you would normally. See “Adding Gifts” page 76 for details.

### Split Gifts

A Split Gift is a transaction that is given in one sum but is to be divided among different purposes or solicitations. For example, a donor may make a payment of \$750.00 to be divided between a restricted fund and unrestricted.

- ▶ **To enter a split gift**
  1. Find the donor record for which you want to enter a split gift, and double-click it. The record appears.

2. From the Initial Gift screen, click **Add** to enter a new gift.
3. Enter the gift information for the first part of the gift.
4. When you're finished entering the gift information, click the Split Gift icon  on the toolbar. The **Enter Split Gift** screen appears.



5. Click **Add**. The **Split Gift Editing** area at the bottom of the screen becomes available.
6. Enter data for the additional portion of the gift, and click **OK**.
7. Repeat steps 5 and 6 for each part of the gift. If you need to correct a previous entry, select it, and click **Edit** (or **Delete**).
8. When finished, click **OK**.
9. When finished with all parts of the gift, click **Done**.

## Linking Notifications/Memorial Gifts/Soft Credits

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

There are three types of gift links you can create:

- **Soft Credit:** use this type to recognize one donor, such as a board member or other solicitor, for the contribution of another. Choosing this type creates a transaction that appears in the giving history, marked as a Soft Credit with an asterisk. The amount does not affect the donor's giving totals unless you change how the system handles calculated fields; for more information, see "Defining Calculated Fields" in the *DonorPerfect Administrator's Guide*.
- **Send Notification:** this type allows you to generate a thank-you letter to the linked name (in addition to the donor) at Acknowledgment Processing time. For instance, a letter can be generated to the person for whom the gift was in tribute. Choosing this



type creates a transaction that appears in the donor's giving history marked as a Notification Letter. The amount does not affect the donor's giving totals.

- **Matching Gift:** this type allows you to enter an amount of money to be given to supplement someone else's donation, usually made by an employer to match an employee's contribution. Choosing this type generates a pledge transaction for the matching gift record.

► **To enter send notification, soft credit, or matching gift links**

1. After you've entered the gift information, click the **Link Name to Gift** button from the Gift Entry screen. The **Linked Gifts** screen appears.

2. Click the **Add** button. The **Gift Type** list becomes enabled.
3. Select a **Gift Type** (**Soft Credit**, **Notification**, or **Matching Gift**), and click **OK**. The **Linked Gift Editing Area** at the bottom of the screen becomes available.
4. To link the gift to an existing donor record (one that has already been entered into the system):
  - a. Click the **Lookup Name to Link** button. The **Enter Name to Look Up** screen appears.
  - b. Enter the name, and click **Lookup** or press **ENTER**. DonorPerfect displays the names that match the one you entered.
  - c. Double-click on the name of the person to whom you want to link. The **Linked Gifts** screen appears, with the name appearing next to the **Lookup Name to Link** button.
  - d. Click **OK**. The linked name appears in the top portion of the **Linked Gifts** screen.
  - e. Repeat steps 2 through 8 for any additional names to link to this gift.

5. To add a new individual donor to the system and link the gift to them:
  - a. Click the **Add New Ind.** button. The Add Donor screen appears:


- b. Fill out the form (see “Adding Individual Donor Records” page 53 for details).
  - c. When you’re finished entering the information for the new donor, click **Done**.
    - If the information you entered **does not** closely match any existing records, a new donor record is created.
    - If the information you entered **does** closely match one or more existing records, the **Duplicate Donor Check** screen appears. See “Checking for Duplicate Records” page 56 for details on this function.
6. To add a new organization to the system and link the gift to it:
  - a. Click the **Add New Org.** button. The Add Donor screen appears:

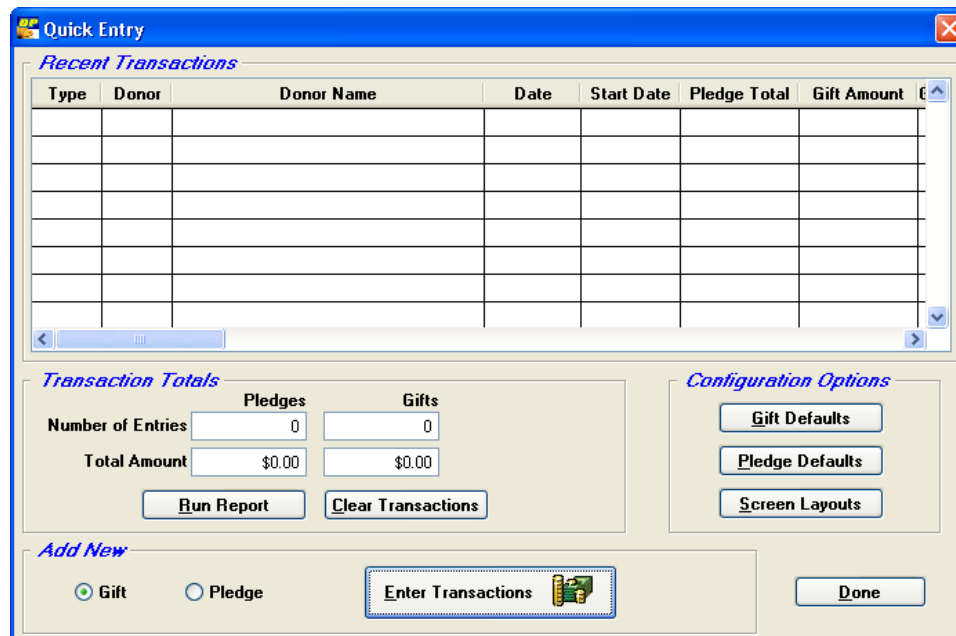
- b. Fill out the form (see “Adding Organization Donor Records” page 57 for details).
- c. When you’re finished entering the information for the new donor, click **Done**.
  - If the information you entered **does not** closely match any existing records, a new donor record is created.
  - If the information you entered **does** closely match one or more existing records, the **Duplicate Donor Check** screen appears. See “Checking for Duplicate Records” page 56 for details on this function.
- 7. Enter or edit the **Amount, TY Letter, Solicitation, and General Ledger**. For matching gifts, enter the **Total Pledge and Bill Amount**.
- 8. When you’re finished linking names, click **Done**.


### Quick Gift Entry

**Quick Gift Entry** allows you to quickly enter a group of gifts or pledge payments from *existing donors* in the system. This streamlined interface allows you to perform several common gift entry tasks from the same screen. This reduces mouse clicks and speeds data entry when you have a number of gifts to enter at the same time. (The Quick Gift Entry screens can be customized, so yours might look different from the ones shown here.)

► **To use the Quick Gift Entry**

1. Click the **Quick Entry** button . The **Quick Entry** screen appears.



 **Tip:** If most of the gifts you’re adding 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, and then click **Done**.

- In the **Add New** section, select **Gift** and then click the **Enter Transactions** button. A blank **Quick Gift Entry** screen appears.

The screenshot shows a software window titled "Quick Gift Entry". At the top left, there is a "1 Search" section containing a "Donor ID:" text box, an "Advanced Lookup" button, and an "OK" button. To the right of the search section are radio buttons for "Gift" (which is selected) and "Pledge Payment". Further right is a "Recently Viewed Constituents:" label and a scrollable list area. The main body of the window is split into two vertical panels: "2 Donor Information" on the left and "3 Gift" on the right. A "Finished" button is located in the bottom right corner of the window.

- In section **1** of the **Quick Gift Entry** screen, enter the **Donor ID** or **Pledge ID** in the Donor ID field by doing one of the following:
  - Type the **Donor ID** and click **OK**.
  - Click the **Advanced Look Up** button to go to the **Enter Name to Look Up** screen, find the donor, and then double-click the donor's name. (For detailed instructions on using the **Enter Name to Look Up** screen, see "Searching for Donors on page 50.)
  - If this is a pledge payment and you know the Pledge ID, select **Pledge Payment**, select **Pledge ID**, type the **Pledge ID**, and then click **OK**.


Take the appropriate action for the screen that appears next:

- If the **List of Pledges** screen appears:


Pledge ID	Total	Balance	Billing Amount	General Ledger	Solicitation
878	\$0.00	\$0.00	\$0.00	Building Fund	


- i. 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.
- b. If a partially completed **Quick Gift Entry** screen appears:

- i. In section **2** of the **Quick Gift Entry** screen, review the donor information and revise it if necessary.
  - ii. In section **3** of the **Quick Gift Entry** screen, enter the gift information.
4. To enter a gift for the next donor, click the **Next** button and repeat step 3.

 **Note:** Each time you enter a gift, the donor's name and ID are added to the Recently Viewed Constituents list on the Quick Gift Entry screen. This will help you keep track of where you are, and you can display details for a donor by clicking the donor's name.

- When you're finished entering gifts, click **Finished** to return to the **Quick Entry** screen. You should now run the **Quick Entry** report to review the gifts you entered. (See the next section for details.)

 **Important!** Do **not** click the Done button if you want to run the Quick Entry report. Clicking Done exits the Quick Entry screen **and** clears the Quick Entry report to reset it for the next group of quick entries.

 **Note:** If you need to clear all the gifts from the Quick Entry screen, click the **Clear Transactions** button. This will reset the display and the Quick Entry report. It will not affect the actual gift entries.

### Viewing the Quick Entry Report

Once you have finished entering gifts using Quick Gift Entry, run the **Quick Entry** report. The Quick Entry report allows you to see the gift entries you have made, so you can check that they have been entered correctly.

► **To run the Quick Entry Report**

- From the **Quick Entry** screen, click the **Run Reports** button.

A **Quick Entry** report is displayed on-screen.

05/18/2007		Your Organization Name Here Batch Listing - Quick Entry							
Donor	Name	Date	Start Date	Total Pledged	# of Pmts	Bill Amount	Amount	G.L.	Solicitation
12	Mr. & Mrs. Calvin Johnson	05/18/2007					0.00	UN	PH00
22	Mr. William Seltz, Jr.	05/18/2007					0.00	UN	UNSO
10	Mr. & Mrs. Edward Hobart	05/18/2007					0.00	UN	BN02
33	Mr. & Mrs. Steve Stern	05/18/2007					0.00	UN	BN02
45	The Adams McKinley Corporation	05/18/2007					0.00	UN	BG00


  

	Pledged		Received	
Cash	0	0.00	0	0.00
Check	0	0.00	0	0.00
American Express	0	0.00	0	0.00
Visa	0	0.00	0	0.00
MasterCard	0	0.00	0	0.00
Other	0	0.00	5	0.00
<b>TOTAL</b>	<b>0</b>	<b>0.00</b>	<b>5</b>	<b>0.00</b>

Pledges		
Total:	0	0.00
Initial Payments:	0	0.00
Balance:		0.00

- To print the report, click the **Print** button  on the **Report Print Preview** toolbar.

3. When you're finished, click the **Close** button  to close the report, and then click **Done** to close the **Quick Entry** screen.

After gifts have been entered, you should run Acknowledgment Processing to create thank-you letters. See page 181 for details.

## Editing a Gift

Once you've entered a gift in the system, you have the option to edit it if necessary.

### ► To edit a gift

1. Find the donor record you want to edit, and double-click it.
2. Click the **Gift** tab. The **Initial Gift Lookup** screen appears, showing gift information in several columns across the screen.



**Note:** To sort the gift list by a specific column (for example, Date or Amount) in ascending order, click the column heading. To sort the column in descending order, click the column heading again.

3. Highlight the gift you want to modify, and click the **Edit** button. The selected gift record appears.
4. Make the necessary changes, and then click **Done**.

## Applying a Gift to a Pledge

A pledge is a promise of a gift to be given at a later date or over a specified period of time. After you have set up a pledge, you can add existing gifts to that pledge in order to fulfill it. (See "Maintaining Pledge Information" page 91 for details on setting up pledges.)



**Note:** If you are adding a new pledge payment, it is inefficient to create it as a gift and add it to the pledge. Instead, you should create it as a pledge payment, which will automatically create a gift entry and populate it with the correct information. If you created the payment as a gift first, you would have to enter all of that information by hand. See "Applying Pledge Payments" page 97 for details.

### ► To apply a gift to a pledge

1. Edit the gift entry (see "Editing a Gift," above).
2. Click the Apply Payment button in the main toolbar:



The Apply Payment to Pledge screen appears:



**Apply Payment to Pledge**  
Pledges for Dr. Clark Savage

Date	Pledge ID	Total	Balance	Billing Amount	General Ledger	Solicitation
07/18/2008	965	\$500.00	\$400.00	\$100.00	Building Fund	Unsolicited
07/18/2008	968	\$2,000.00	\$1,650.00	\$250.00	Unrestricted	Unsolicited

Buttons: **Apply Payment**, **Cancel**, **Different Donor**

3. If desired, you can select a different donor and apply the gift towards one of their pledges instead:
  - a. Click the **Different Donor** button. The Enter Name to Look Up screen appears:

**Enter Name to Look Up**

Last Name/ID#  (or Organization)

First Name

City

State

Buttons: **Lookup**, **Clear**

0 records found

ID#	Name	Contact/Org. Name	Address	City, St Zip

Buttons: **Cancel**, **Done**

- b. Search for and select the name of the donor whose pledge you want to apply the gift towards. The functionality of this screen is identical to the standard Search screen. See “Searching for Donors” page 50 for details.
    - c. Click the **Done** button. The Apply Payment to Pledge screen will now display the outstanding pledges for the new donor.
4. Select the pledge you want to apply the gift towards.
5. Click the **Apply Payment** button. The Apply Payment to Pledge screen closes, and you will be returned to the Gift Entry screen. Click the **Done** button when finished.

## Deleting a Gift

DonorPerfect allows you to delete gifts you've entered; however, be sure you want to delete the gift from the system because it will no longer be available or included in Acknowledgment Processing.

► **To delete a gift**

1. Find the donor record you want to delete, and double-click it.
2. Click the **Gift** tab. The **Initial Gift Lookup** screen appears.
3. Highlight the gift you want to delete, and click the **Delete** button. The following message appears: **Are you sure you want to delete this record?**
4. Click **Yes**. The gift is deleted from the system.

## Maintaining Pledge Information

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

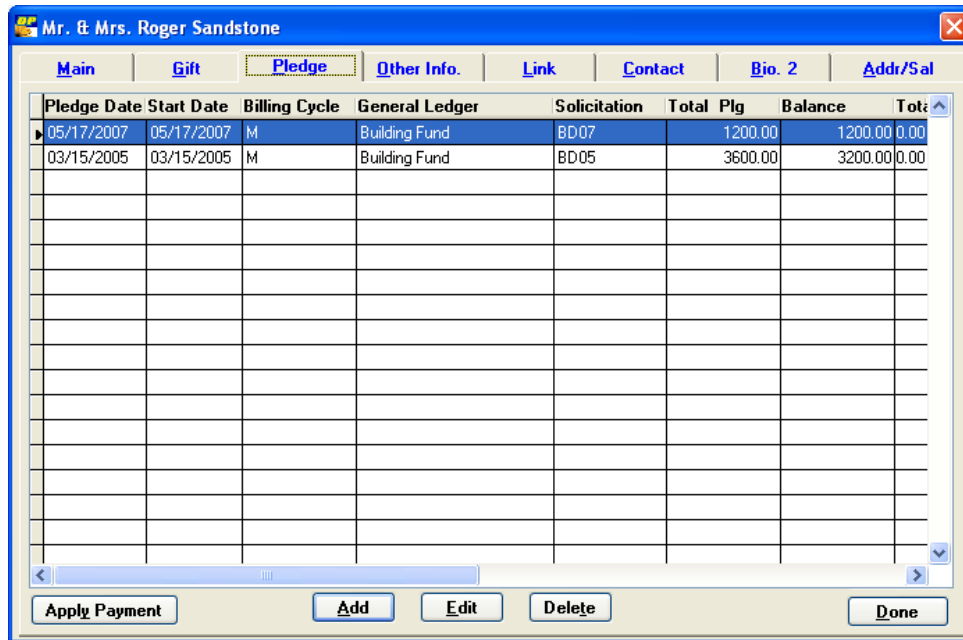
### Adding Pledges

The **Pledge Entry** screen, like all other screens in DonorPerfect, can be modified to meet the needs of each specific organization; therefore, the graphic and the field descriptions included in this section may not match the format for your organization.

When adding new pledges, default values may display in some fields when you first enter the **Pledge Entry** screen. For more information on setting up default values, see page 29.


► **To add a pledge**


1. Find the donor record for which you want to add a pledge, and double-click it. The record appears.
2. Click the **Pledge** tab. The initial **Pledge Lookup** screen appears.



- Click the **Add** button. The **Pledge Entry** screen appears.

- Complete the following fields for the pledge:

- Pledge Date:** the date the pledge was made by the donor. This field defaults to the current system date, but you can select another date. As with other date fields, right-clicking on the field or clicking the magnifying glass  displays a calendar from where you can select a date. This field is commonly used to represent the date the pledge was made.
- Start Date:** the date on which to start the billing cycle and send the first pledge reminder.



**Note:** The Start Date should never be before the Pledge Date. This will cause delinquent pledges to be calculated incorrectly.

- Total:** the total pledge amount. If you're entering a **perennial pledge** (for example, \$10 a month), which means it's an ongoing pledge with no end date or total amount, enter 0.
- Initial Payment:** the initial payment should be entered if a portion of the pledge is paid at the time the pledge is made. This prevents a negative amount from being calculated in the Delinquent Amount field, which could occur if a payment is made in the same month as the Start Date.
- Number of Payments:** this field is optional and does not exist in all systems. It is used in the Quick Pledge Entry process. If **Number of Payments** and **Total Pledge Amount** have been entered, the **Billing Amount** is automatically calculated. For instance, if the **Total Pledge** is \$100 and the **Number of Payments** is 5, the **Billing Amount** will automatically fill with \$20. If this field

is not on your pledge screen, add it to the Gift (DPGIFT.DBF) table and Pledge Entry screen. The field name is **nb\_pmts**, and it must be a Character type. Add it to the screen, and set **Scrvalid** to **Y**. For more details on adding fields, see “Adding Fields” in the *DonorPerfect Administrator’s Guide*.

- **Billing Amount:** the amount to be invoiced for each billing cycle. If the donor has an unusual payment schedule (see Billing Cycle below), this amount will be zero.
- **Billing Cycle:** the value shown in this field determines how often the pledge is to be billed. You have the following choices: Weekly, Every Other Week, Twice Per Month, Monthly, Every Other Month, Quarterly, Semi-Annual, Annual, Unknown (don’t bill), or Unusual Payment (any payment cycle other than weekly, every other week, twice per month, monthly, every other month, quarterly, semi-annual, annual, or unknown). For details on using an unusual payment schedule, see Entering an Unusual Payment Schedule, page 95.
- **Send Reminder?** must be selected for pledge reminders to be generated during pledge processing. For more information on pledge reminders, see page 189.
- **General Ledger:** the fund (general ledger account) that will be credited for the pledge gift. For examples of General Ledger codes, see page 46.
- **Solicitation:** this field tells what solicitation or effort is responsible for generating the pledge. For examples of solicitation codes, see page 47.
- **Thank You Letter:** the number of the thank-you letter the donor should receive for this pledge.
- **Campaign:** this optional field can be automatically filled based on the entry in Solicitation or General Ledger. For instance, if there is an annual campaign code of AN08 made up of 3 different solicitations (for example, mailing, phonathon, and dinner), you can set the campaign field to automatically fill with AN08 whenever one of those solicitations is entered in a gift. For more information on how to set this up, see the discussion of the **Auto-Fill Campaign** field under **SOL (Solicitation Code)** in “Adding Codes” page 41.
- **Gift Solicitor:** The person in your organization responsible for bringing in the gift.
- **Write-off Amount:** if a portion of the total is not going to be paid, enter the amount to be written off. The pledge balance is then determined by the following calculation: (Pledge Total) – (Total of Pledge Payments) – (Write-off Amount).

- **Write-off Date:** if a portion of the total is going to be written off, the date of the write-off.
  - **Thank You Address:** the address to which this thank-you letter should be sent.
5. When you are finished entering all information for the record, click **Done**.

If you added a pledge that had an initial payment, you'll see the following message:

**Press OK then press the Pledge Tab and Apply Payment to complete the initial payment transaction.**

Click the **Pledge** tab, and then click the **Apply Payment** button to create the initial payment for the pledge. The record is updated with the payment. For more information on applying pledge payments, see page 97.

### **Linked Pledges**

The **Link Name to Pledge** option allows you to link another donor record to the current pledge as a Soft Credit, Notification, or Matching Gift Link.

### **Types of Pledge Links**

In DonorPerfect, there are three types of pledge links you can create:

- **Soft Credit:** use this type to recognize one donor, such as a board member or other solicitor, for the contribution of another. Choosing this type creates a transaction that appears in the giving history, marked as a Soft Credit with an asterisk. The amount does not affect the donor's giving totals unless you change how the system handles calculated fields; for more information, see "Defining Calculated Fields" in the *DonorPerfect Administrator's Guide*.
- **Send Notification:** this type allows you to generate a thank-you letter to the linked name (in addition to the donor) at Acknowledgment Processing time. For instance, a letter can be generated to the person for whom the pledge was in tribute. Choosing this type creates a transaction that appears in the donor's giving history marked as a Notification Gift. The amount does not affect the donor's giving totals.
- **Matching Pledge:** this type allows you to enter an amount of money given to supplement someone else's donation, usually made by an employer to match an employee's contribution. Choosing this type generates a pledge transaction for the matching gift record.

#### **► To enter a linked pledge**

1. From the **Pledge** entry screen, click **Link Name to Pledge**. The **Linked Gifts** screen appears.
2. Click **Add**. The **Set Type of Gift Link** screen appears.
3. Select the link type (Soft Credit, Send Notification, or Matching Gift), and click **OK**. The **Linked Gift Editing Area** becomes available.

4. If necessary, enter the **TY Letter**, **Solicitation**, and **General Ledger**. For matching pledges, enter the **Total Pledge** and **Bill Amount**.
5. To identify the person linked to the pledge, click the **Lookup Name to Link** button. The **Enter Name to Look Up** screen appears.
6. Enter the name, and click **Lookup** or press **ENTER**. DonorPerfect displays the names that match the one you entered.
7. Double-click on the name of the person to whom you want to link. The **Linked Gifts** screen appears, with the name appearing next to the **Lookup Name to Link** button.
8. Click **OK**. The linked name appears in the top portion of the Linked Gifts screen.
9. Repeat steps 5 –8 for any additional names to link to this pledge.
10. When you're finished linking names, click **Done**.

### Entering an Unusual Billing Schedule

If the billing schedule for a pledge does not fit into one of the pre-defined schedules (for example, Monthly or Quarterly) or the billing amounts for each payment are not the same, you can set a specific billing schedule.

#### ► To set an unusual billing schedule

1. On the **Pledge Entry** screen for the pledge you want to set an unusual billing schedule for, choose **Unusual Payment Schedule** from the **Billing Cycle** pull-down.

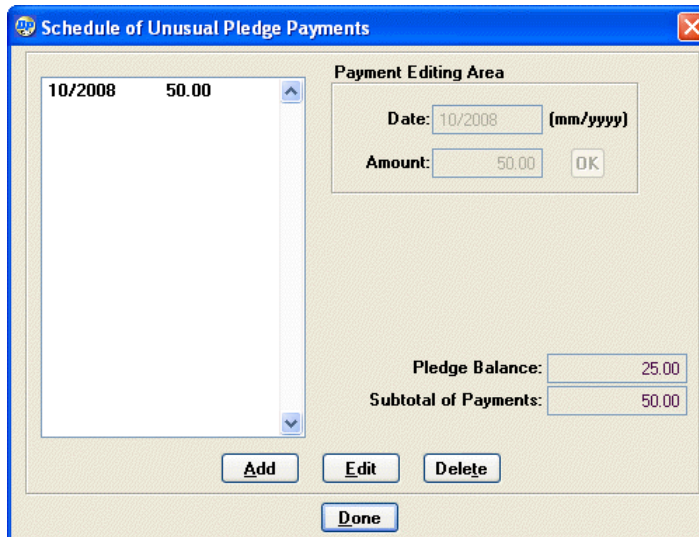


**Note:** Be sure the **Billing Amount** field on the Pledge Entry screen is 0.00

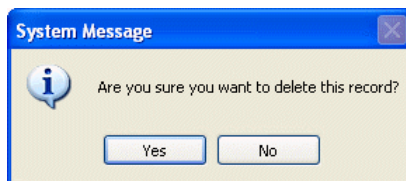
2. Click the **Schedule of Payments** button. The **Schedule of Unusual Pledge Payments** screen appears.

The screenshot shows a software window titled "Schedule of Unusual Pledge Payments". The window is divided into two main sections. On the left is a list box that currently displays "<No Records>". On the right is a "Payment Editing Area" which contains several input fields and buttons. The "Date" field is set to "05/1994" with a "(mm/yyyy)" label. The "Amount" field is set to "1000.00" and has an "OK" button next to it. Below these fields, there are two summary fields: "Pledge Balance" with a value of "25.00" and "Subtotal of Payments" with a value of "0.00". At the bottom of the window, there are four buttons: "Add", "Edit", "Delete", and "Done".

3. To add a pledge payment to the schedule:
  - a. Click the **Add** button.
  - b. In the Payment Editing Area, enter the **Date** for the payment in the format **MM/YYYY** (ex: 08/2008).
  - c. Enter the **Amount** of the payment.
  - d. Click the **OK** button. The new scheduled pledge payment appears in the list:



4. To edit a scheduled pledge payment:
  - a. Select the scheduled payment in the list of payments on the left side of the screen.
  - b. Edit the **Date** and/or **Amount** of the payment.
  - c. Click the **OK** button.
5. To delete a scheduled pledge payment:
  - a. Select the scheduled payment in the list of payments on the left side of the screen.
  - b. Click the **Delete** button.



- c. Click the **Yes** button to delete the scheduled payment, or click the **No** button to cancel deletion.
6. When you are finished editing the payment schedule, click the **Done** button. You will be returned to the Pledge Entry screen.



### Pledges with Indefinite Ending Dates

If a donor has pledged to give a specific amount each billing cycle without an ending date for the pledge, enter the following in the **Pledge Entry** screen:

- Total:** 0
- Billing Amount:** enter the amount to be invoiced for each billing cycle
- Billing Cycle:** enter the frequency of each billing cycle

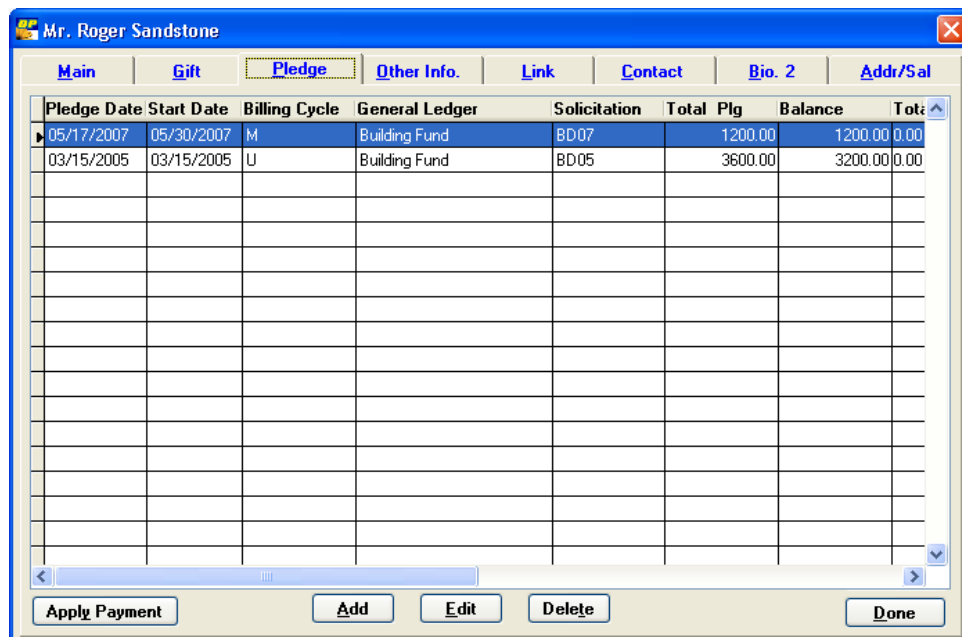
The Balance Due will remain at 0.00, but the Delinquent Amount will update as payments are made in response to pledge reminders. Therefore, this pledge will appear to have been paid ahead of schedule, because the Delinquent field will have a negative number in it.

### Applying Pledge Payments

The **Apply Payment** button on the **Initial Pledge Lookup** screen automatically creates a gift payment record that lowers the pledge balance. The amount defaults to the Billing Amount. Each time you receive a gift as a payment for a pledge, you need to apply a pledge payment.

► **To apply pledge payments**

1. Find the donor record for which you want to apply pledge payments, and double-click it. The record appears.
2. Click the **Pledge** tab. The **Initial Pledge Lookup** screen appears.



3. Highlight the pledge to which the payment should be applied, and click the **Apply Payment** button. A message appears, telling you that you'll be creating a pledge payment.
4. Click **OK**. The **Gift Entry** screen appears.

5. Enter or edit additional data if needed. The General Ledger and Solicitation fields are automatically completed with information you entered when you created the pledge. The Amount of Gift is completed as the pledge's Billing Amount.


6. When you are finished entering the payment information, click **Done**. The following pledge information is automatically updated within the Pledge record:
- **Balance Due:** the total pledge amount minus payments and any write-off amount; updated each time a pledge gift is entered through Apply Payment. (See page 194 for information about writing off a pledge).
  - **Delinquent Amount:** the total amount billed (to date) minus payments; updated each time a pledge payment gift is entered through Apply Payment, and each time reminders are run. For details on how this field is calculated, see page 191.
  - **Last Paid:** this field is updated each time a payment is entered through Apply Payment.
  - **Last Date Billed:** this field is updated each time the pledge is included in pledge reminders.

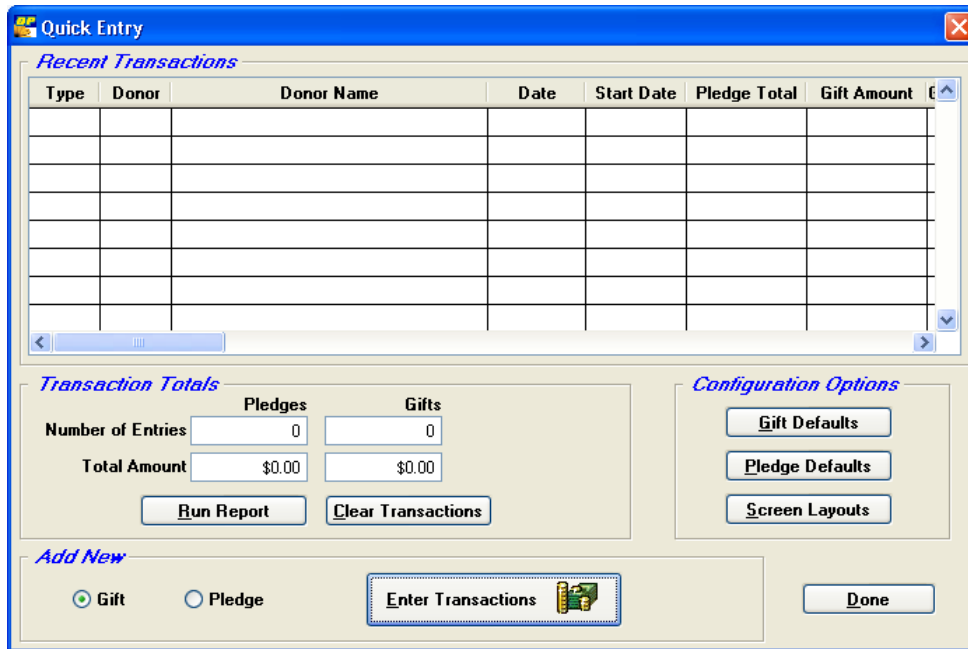
If you are reviewing a pledge record after payments have been applied, you can view all payments that have been made for the pledge. To do this, click the **List Pledge Payments** button. The **List of Pledge Payments** screen appears, listing the Date, Amount, General Ledger, Solicitation, and Reference for each payment.


## Quick Pledge Entry

**Quick Pledge Entry** allows you to quickly enter a group of pledges from *existing donors* in the system. This streamlined interface allows you to perform several common pledge entry tasks from the same screen. This reduces mouse clicks and speeds data entry when you have a number of pledges to enter at the same time. (The Quick Pledge Entry screens can be customized, so yours might look different from the ones shown here.)

► **To use Quick Pledge Entry**

1. Click the **Quick Entry** button . The **Quick Entry** screen appears.





**Tip:** If most of the pledges you're adding have some information in common, you can save time by assigning pledge defaults. Click the **Pledge Defaults** button, enter the common information, and then click **Done**. You can also assign gift defaults for gifts that will be entered as initial payments. Click the **Gift Defaults** button, enter the common information, and then click **Done**.

- In the **Add New** section, select **Pledge** and then click the **Enter Transactions** button.

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

The screenshot shows a software window titled "Quick Pledge Entry". The window has a blue title bar with standard Windows window controls (minimize, maximize, close). The main content area is light beige and is divided into several sections. At the top left, there is a section labeled "1 Search". Inside this section, there is a text input field labeled "Donor ID:". Below the input field are two buttons: "Advanced Lookup" and "OK". To the right of the search section, there is a section labeled "Recently Viewed Constituents:" with a list box and a scroll bar. Below the search section, the main area is split into two columns. The left column is labeled "2 Donor Information" and the right column is labeled "3 Pledge". Both columns are currently empty. At the bottom right of the window, there is a button labeled "Finished".

- In section **1** of the **Quick Pledge Entry** screen, enter the donor's ID in the **Donor ID** field by doing one of the following:
  - Type the donor's ID and click **OK**.
  - Click the **Advanced Lookup** button to go to the **Enter Name to Look Up** screen, find the donor, and then double-click the donor's name. (For detailed instructions on using the **Enter Name to Look Up** screen, see "Searching for Donors" on page 50.)


A partially completed **Quick Pledge Entry** screen appears.

4. In section **2** of the **Quick Pledge Entry** screen, review the donor information and revise it if necessary.
5. In section **3** of the **Quick Pledge Entry** screen, enter the pledge information.
6. If you entered an initial payment, click **Next**. The **Pledge** fields in section **3** of the **Quick Entry** screen change to **Pledge Payment** fields. Enter information about the initial payment in these fields.
7. If the pledge has an **Unusual Billing Cycle**, click **Next**. The **Schedule of Unusual Pledge Payments** screen appears. Enter the date and amount of each payment, and then click **Done**. (For more information about the **Schedule of Unusual Pledge Payments** screen, see page 95.)
8. To enter another pledge, click **Next** and repeat steps 3–7.




**Note:** Each time you enter a pledge, the donor's name and ID are added to the **Recently Viewed Constituents** list on the **Quick Pledge Entry** screen. This will help you keep track of where you are, and you can display details for a donor by clicking the donor's name.

- When you're finished entering pledges, click **Finished** to return to the **Quick Entry** screen. You should now run the **Quick Entry Report** to review the pledges you entered. (See the next section for details.)



**Important!** Do not click the **Done** button if you want to run the Quick Entry Report. Clicking **Done** exits the Quick Entry screen **and** clears the Quick Entry Report to reset it for the next group of quick entries.



**Note:** If you need to clear all the pledges from the Quick Entry screen, click the **Clear Transactions** button. This will reset the display and the Quick Entry report. It will not affect the actual pledge entries.

### Viewing the Quick Entry Report

Once you have finished entering pledges using Quick Pledge Entry, run the **Quick Entry** report. The Quick Pledge report allows you to see what pledge entries you have made, so you can check that they have been entered in correctly.

► **To run the Quick Pledge Entry Report**

- From the **Quick Entry** screen, click the **Run Reports** button.

A **Quick Entry** report is displayed on-screen.



Donor Name		Date	Start Date	Total Pledged	# of Pmts	Bill Amount	Amount	G.L.	Solicitation
12	Mr. & Mrs. Calvin Johnson	05/18/2007					0.00	UN	PH00
22	Mr. William Setz, Jr.	05/18/2007					0.00	UN	UNSO
10	Mr. & Mrs. Edward Hobart	05/18/2007					0.00	UN	BW02
33	Mr. & Mrs. Steve Stern	05/18/2007					0.00	UN	BW02
45	The Adams McKinley Corporation	05/18/2007					0.00	UN	BG00

	Pledged		Received	
Cash	0	0.00	0	0.00
Check	0	0.00	0	0.00
American Express	0	0.00	0	0.00
Visa	0	0.00	0	0.00
MasterCard	0	0.00	0	0.00
Other	0	0.00	5	0.00
<b>TOTAL</b>	<b>0</b>	<b>0.00</b>	<b>5</b>	<b>0.00</b>

Pledges	
Total:	0 0.00
Initial Payments:	0 0.00
Balance:	0.00

- To print the report, click the **Print** button  on the **Report Print Preview** toolbar.
- When you're finished, click the **Close** button  to close the report, and then click **Done** to close the **Quick Entry** screen.

After pledges have been entered, you should run Acknowledgment Processing to create thank-you letters. See page 181 for details.

### Editing Pledges

Once you've entered a pledge in the system, you have the option to edit it if necessary.

**► To edit a pledge**

1. Find the donor record you want to edit, and double-click it.
2. Click the **Pledge** tab. The **Initial Pledge Lookup** screen appears, showing pledge information in several columns across the screen.



**Note:** To sort the pledge list by a specific column (for example, Pledge Date or Billing Cycle) in ascending order, click the column heading. To sort the column in descending order, click the column heading again.

3. Highlight the pledge you want to modify, and click the **Edit** button. The selected pledge record appears.
4. Make the necessary changes, and then click **Done**.

## Deleting Pledges

DonorPerfect allows you to delete pledges you've entered; however, be sure you want to delete the pledge from the system because it will no longer be available.

**► To delete a pledge**

1. Find the donor record you want to edit, and double-click it.
2. Click the **Pledge** tab. The **Initial Pledge Lookup** screen appears.
3. Highlight the pledge you want to delete, and click the **Delete** button. The following message appears: **Are you sure you want to delete this record?**
4. Click **Yes**. The pledge is deleted from the system. Any payments made will remain as gifts.



## Maintaining Other Information for Donors

The **Other Information** entry screen allows you to maintain non-financial transactional information about donors. There are many possible uses for this tab such as tracking volunteer hours or names of children.



**Note:** Like all other DonorPerfect entry screens, the Other Information screen can be modified to meet your organization's individual needs. For this reason, the fields, graphics, and instructions in this section may not match the layout used by your organization. The pull-down in the upper right corner of the screen allows you to access sub-screens; some of the fields included in the graphics in this section may appear on these sub-screens.

### Adding Other Information

To capture additional information, such as volunteer hours or board terms, for your donors, use the Other Information screen.

#### ► To add other information

1. Find the donor record for which you want to add other information.
2. Double-click the record. The record appears.
3. Click the Other Info. tab. The Initial Other Information Lookup screen appears.

Date	Hours Worked	Project	Board/Committee	Children's Name
05/26/2007	3.0	Clerical		
03/22/2007	4.0	Fund Raising		
07/01/2006	5.0		Capital Campaign Committee	
09/01/2005				Cindy
09/01/2005				Jan
09/01/2005				Marcia

4. Click **Add**. The **Other Information Entry** screen appears.

5. Enter the transactional information (for example, date and hours worked).
6. When you're finished entering information, click **Done**.

## Editing Other Information

As donors' relationships with your organization change (for example, the end date of the board term changes), you may need to edit their Other Information records.

### ► To edit other information

1. Find the donor record you want to edit, and double-click it. The record appears.
2. Click the **Other Info.** tab. The **Initial Other Information Lookup** screen appears, showing other information in several columns across the screen.



**Note:** To sort the list by a specific column (for example, Date or Hours) in ascending order, click the column heading. To sort the column in descending order, click the column heading again.

3. Highlight the Other Information record you want to modify, and click the **Edit** button. The **Other Information Entry** screen appears for the record you selected.
4. Make the necessary changes, and then click the **Done** button.

## Deleting Other Information

As donors' relationships with your organization change, you may need to delete their Other Information records. Before deleting the record, be sure that you want to remove it from the system; once it is deleted, you will no longer be able to access the information.

► **To delete other information**

1. Find the donor record for which you want to delete the other information record, and double-click it. The record appears.
2. Click the Other Info. tab. The Initial Other Information screen appears.
3. Highlight the record you want to delete, and click the **Delete** button. The following message appears: **Are you sure you want to delete this record?**
4. Click **Yes**.

## Linking Records

The **Link** screen stores an unlimited number of relational “links” between records. For instance, you can link a donor to their children or grandchildren. This option can only be used if both records to be linked have been entered in the system. Creating links between records allows you to see how your donors are related, and if you set up your link codes to have reciprocal links, you can easily navigate to the linked record when you click the Link tab. Just click the **Go to Linked Record** button, and the system opens the linked record. For information on how to set up reciprocal links, see page 110.



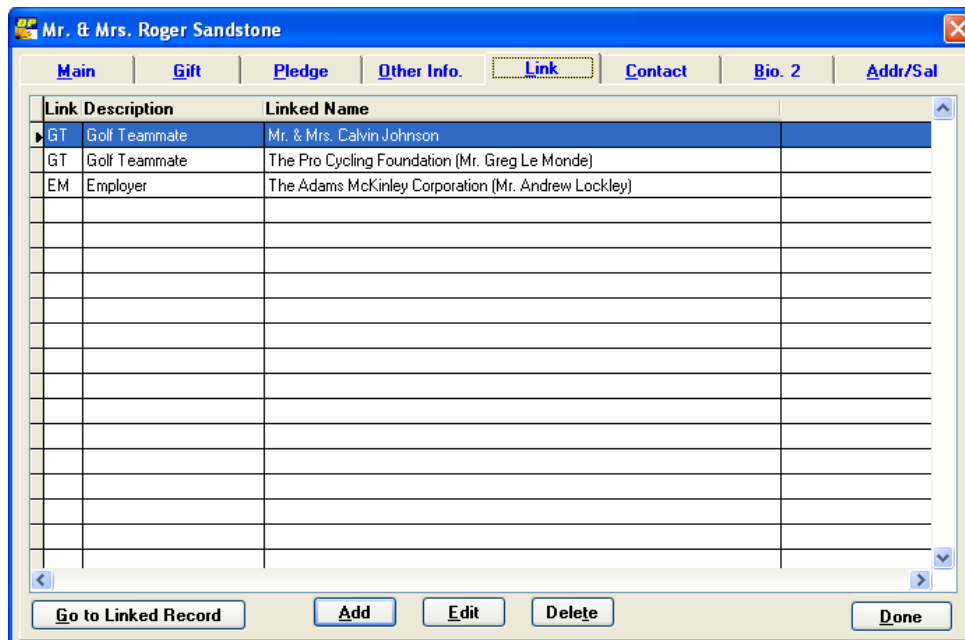
**Tip:** Try to make your link codes as generic as possible, so you’ll be able to use them across many donors. For example, instead of setting up one code for *brother* and one for *sister*, just set up one for *sibling*.

## Adding Links

Linking records is a great way to capture relationships between different donors in your system.

► **To add links**

1. Find the donor record for which you want to add links, and double-click it. The record appears.
2. Click the **Link** tab. The **Initial Link Lookup** screen appears.



3. Click **Add**. The **Link Entry** screen appears.
4. Enter the **Link Code** designating the relationship of this record to the linked record. Some examples of link codes are CH for Child, PA for Parent, EE for Employee,

and EM for Employer. For information on how to modify the codes appearing on this list, see page 29.

5. In the **ID of Name to Link** field, enter the ID # of the record you are linking to if you know it. However, you will seldom know this, so you will usually have to look up the name. To do this, click the **Lookup Name to Link** button. Enter the name you are searching for, and click **Lookup** or press **ENTER**. DonorPerfect displays the names matching the one you entered. Highlight the appropriate name, and double-click it or press **Enter**. DonorPerfect automatically enters the link's ID # and name into the donor's file.

6. When you are finished entering all information for the record, click **Done**.

## Editing Links

As relationships between donors change, you may need to edit and update their links.

### ► To edit links

1. Click the **Link** tab. The **Initial Link Lookup** screen appears, showing link information in several columns across the screen.



**Note:** To sort the list by a specific column (for example, Link or Description) in ascending order, click the column heading. To sort the column in descending order, click the column heading again.

2. Highlight the link you want to modify, and click the **Edit** button. The **Link Entry** screen appears for the record you selected.
3. Make the necessary changes, and then click the **Done** button.

## Deleting Links

If a relationship between donors is terminated (for example, an employee leaves an employer), you may need to delete the link that captures the relationship.

► **To delete links**

1. Find the donor record for which you want to delete a link, and double-click it. The record appears.
2. Click the **Link** tab. The **Initial Link Lookup** screen appears.
3. Highlight the link you want to delete, and click the **Delete** button. The following message appears: **Are you sure you want to delete this record?**
4. Click **Yes**, and then click **Done**.

## Configuring Reciprocal Links

When a link is created from one record to another, the system automatically creates a reciprocal link from the second record back to the first. For instance, if you create an "employer" link from Roger Sandstone to the company he works for, the system will automatically create an "employee" link for that company that points back to Roger.

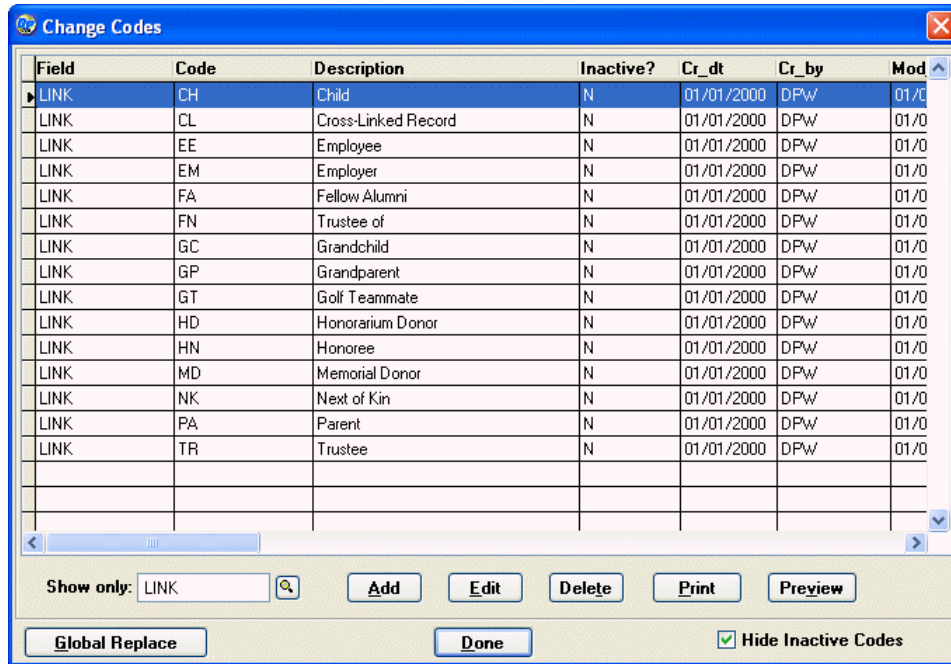
In order for this to work properly, however, you must specify for each type of link what the corresponding reciprocal link type will be. For instance, for Parent, you would specify that the reciprocal link should be a Child link. This is set up in the Code Maintenance screen.

► **To configure the reciprocal links for each link type**

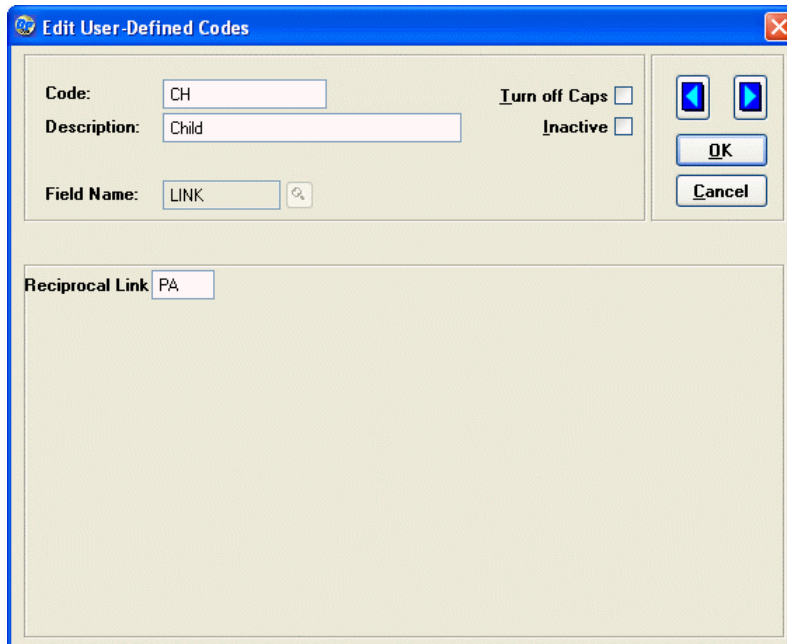
1. Select **Utilities**, then **Code Maintenance**.



2. Set **Show only** to **LINK**.
3. Press the **TAB** key. The current link type codes in the system will be listed.



4. For each link code, do the following:
  - a. Select the code.
  - b. Click the **Edit** button. The Edit User-Defined Codes screen for that code will open:



- c. Set **Reciprocal Link** to the code for the type of link to be used as the reciprocal link. For instance, for the **CH** (Child) link type, you would select **PA** (Parent).
  - d. Click the **OK** button. You will be returned to the list of link types.

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

## Maintaining Contact Management Information

Contact Management helps you organize your work and keep track of ongoing projects and their associated follow-up activities. You can set up your system to automatically remind you of your activities; for more information, see “Setting Up & Modifying Contact Management Reports” in the *DonorPerfect Administrator’s Guide*.

### Adding Contact Management Information

Use the Contact Management screen to enter ongoing tasks and activities.



**Note:** The **Contact Management Entry** screen, like all DonorPerfect entry screens, can be modified to meet your organization’s individual needs. Therefore, the following graphic may not match the layout used by your organization.

► **To add contact management information**

1. Find the donor record for which you want to add contact management information, and double-click it. The record appears.
2. Click the Contact tab. The Initial Contact Management Lookup screen appears.

Due Date	Comp. Date	Mailing Code	Activity	Comments
01/03/2006	/ /		Meeting	Need to set up meeting for winter event
05/20/2005	12/28/2005		Telephone Call	Reminder to talk about Rogers & Mary's planne
05/20/2004	05/20/2004	SU04	Letter	Summer Mailing
04/18/2003	04/18/2003	NL03	Mailing	Major Donor's Mailed Newsletter
06/12/2002	06/17/2002		Meeting	Meeting at 3:30 PM to talk about Roger's and
04/10/2002	04/15/2002		Telephone Call	Ask Roger to call Greenbaum to discuss the pe
07/16/2001	07/26/2001		Telephone Call	Invite to Finance Mtg
06/29/2001	06/29/2001		Telephone Call	Roger accepted chair
02/19/2001	02/19/2001		Meeting	Lunch with Roger and Mary
/ /	03/01/2006	SM06	Mailing	



- Click **Add**. The **Contact Management** entry screen appears.

- Complete the following information for the contact:
  - Activity:** the activity to be performed. Examples are MEET for Meeting or PHON for Phone Call.
  - Contact Person:** the person in your organization who is assigned to perform the activity.



**Note:** To use the automatic reminder option for your own activities, you must enter your User ID exactly in this field or you can select from the pull-down. This is the same User ID you use to log into DonorPerfect.

- Date Due:** the date you plan to perform the activity or need to be reminded of it. If the automatic reminder option is turned on, the system reminds you of any activities with due dates prior to or equal to the current date that do not have the Date Completed field filled in.
  - Date Completed:** the date the activity was actually performed.
- When you're finished entering information for the contact, click **Done**.

## Editing Contact Management Information

If you've completed a task that you entered in Contact Management or the task has changed, you can easily edit the information.

### ► To edit contact management information

- Find the donor record for which you want to edit the contact management information, and double-click it. The record appears.

2. Click the **Contact** tab. The **Initial Contact Management Lookup** screen appears, showing contact management information in several columns across the screen. To sort the list by a specific column (for example, Due Date or Activity) in ascending order, click the column heading. To sort the column in descending order, click the column heading again.
3. Highlight the contact management record you want to modify, and click the **Edit** button. The **Contact Management** entry screen appears for the record you selected.
4. Make the necessary changes, such as filling in the Completed Date field, and then click the **Done** button.

## Deleting Contact Management Information

If you no longer need to keep a contact management task in the system, you can delete it from the contact management list.

### ► To delete contact management information

1. Find the donor record for which you want to delete contact management information, and double-click it. The record appears.
2. Click the **Contact** tab. The **Initial Contact Management Lookup** screen appears.
3. Highlight the contact record you want to delete, and click the **Delete** button. The following message appears: **Are you sure you want to delete this record?**
4. Click **Yes**.

## Integrating Contact Information with Outlook

Outlook DonorPerfect offers two levels of Outlook integration: calendar and email.

Calendar integration allows you to export an existing contact record from DonorPerfect and send it to Outlook as a calendar entry. This will help you synchronize your activity list in DonorPerfect with your Outlook Calendar.

Email integration allows you to seamlessly import your Outlook emails as new contact records. The result of this integration is the ability to track your entire email communication history with the donor. When activated, DonorPerfect will automatically check for emails waiting to be imported when you log into the system.




**Note:** You must have Outlook 2003 installed on your computer to use this feature. In addition, a DonorPerfect-Outlook Plugin is required; to download this plugin, please visit the Clients Only section of our website.

### Installing the DonorPerfect-Outlook Plugin

#### ► To install the DonorPerfect-Outlook Plugin


1. Visit the **Clients Only** section of the DonorPerfect Website ([www.donorperfect.com](http://www.donorperfect.com)).
2. Click on the **Downloads/Updates** link.
3. Select the **DonorPerfect-Outlook Plugin** and download it to your local computer.
4. After the download is complete, extract the contents of the zip file into a folder.
5. Run the file called Setup.exe and follow the on-screen instructions.
6. When the installation is complete, click **Finish**. You are ready to begin using the Outlook integration feature of DonorPerfect.

### Exporting a Contact Entry to Outlook

Anywhere you see the Outlook icon , you can integrate with your Outlook Calendar. You will find these icons on any donor Contact record and in the Contact Management reports section of the program (see the *DonorPerfect Reports* manual).

#### ► To create an Outlook Calendar entry from the Contact Screen

1. Navigate to any donor and select any existing Contact record.

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

## Importing Outlook Emails to DonorPerfect


### ► To select emails to import

1. From within Outlook, select one or more emails that would like to import into DonorPerfect.
2. Click the **Save to DP** button in your Outlook toolbar. The highlighted emails are now ready to be imported into DonorPerfect.

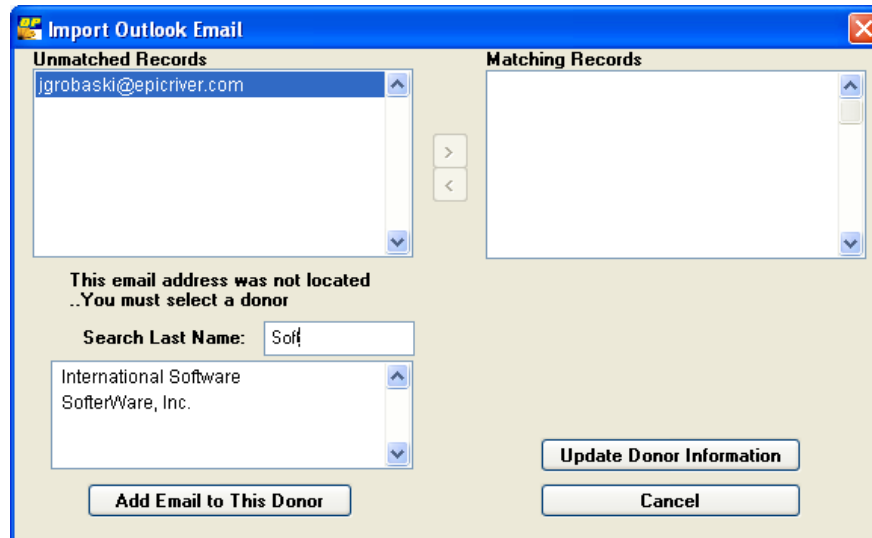


**Note:** You must have the DonorPerfect-Outlook Plugin installed on your local machine for this feature to be available.

### ► To enable automatic import of selected emails when you log in

1. From the Utilities menu, select Change Parameters, and then select User Security Settings; or click the Utilities button , select Change Parameters, and then select User Security Settings.
2. Select the desired users and click the **Edit** button.
3. On the General user settings tab, click Auto Import Outlook Email.

4. Click on the **Email/WP** tab and enter the **Sender Address** and **Sender Name**. These fields are used to help match incoming email messages with particular users of DonorPerfect.
  - If the system finds an email match, a new contact record will be created.
  - If no match is found, DonorPerfect will prompt to you to select an existing donor from the database.



5. If you are prompted to find an existing donor from the database, locate the donor and then click the **Add Email to This Donor** button. Then click the **Update Donor Information** button to create the new contact record.
- **To manually import Outlook emails**
1. From the main screen, click the **Modules** button, and select **Import Outlook Email**.

## 6. Working with Selection Filters

Selection filters allow you to select a small number of records in your database that have one or more characteristics in common, and then run lists, mailings or reports using only those records. For example, you could create a filter that selects only the donors who live in a specified city. If you had an event in that city, you could then use that filter to send out notices to only the donors that live there.

### Overview

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This chapter gives you an overview of how selection filters are used to create lists, reports, and exports. See the following sections for more information:

- “Basic Selection Filter Concepts”
- “Where Selection Filters Are Used”—see page 118
- “Types of Selection Filters”—see page 119
- “What to Consider When Creating a Selection Filter”—see page 119
- “Operators Available for Use with Selection Filters”—see page 124
- “Setting a Selection Filter”—see page 121
- “Advanced Uses of Selection Filters”—see page 128
- “Managing Selection Filters”—see page 133
- “Customizing Descriptions for Selection Filter Fields”—see page 142

### Basic Selection Filter Concepts

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#### Where Selection Filters Are Used

Selection filters allow you to identify donors in your database who have one or more characteristics in common. They allow you to work with a specific group of donors in your database instead of working with the entire database. When you want to perform a specific action for the entire database (all records in your system), you don’t need to use a selection filter.

Selection filters are used with the following DonorPerfect features:

- Lookup of Donor Records (see page 50)
- Financial Reports (see the *DonorPerfect Reports* manual)
- Donor Listings (see the *DonorPerfect Reports* manual)
- Custom Reports (see the *DonorPerfect Reports* manual)
- Exporting Reports (see the *DonorPerfect Reports* manual)

- Labels (see page 170)
- Mail Merges (see page 158)
- Group Email (see page 152)
- Pledge Processing (see page 189)
- Flexible Information Generator (see the *DonorPerfect Administrator's Guide*)
- Duplicate Maintenance (see the DonorPerfect Administrator's Guide)

## Types of Selection Filters

Selection filters can range from simple to complex. Simple filters can search one value in one field, multiple values in one field, one or more values in different fields, and values across databases. Complex filters can contain more than one simple filter. Selection filters require the use of operators in order to compare a value to the contents of a field.

### Simple Filters

The following are examples of simple filters you can create in DonorPerfect:

- One value in one field: gifts of \$50.
- Multiple values in one field: gifts ranging from \$50 to \$100.
- One or more values in different fields: gifts of \$100 or more for the building fund.
- Multiple databases: gifts of \$100 or more between January 2005 to June 2005 (Main table) given by donors from Pennsylvania, New Jersey, or New York (Address table).

### Complex Filters

Complex filters typically have the following characteristics:

- use AND *as well as* OR within the same database
- edit the filter in the Selection Verification screen, often to insert parentheses

For more information on complex filters, see page 128.

## What to Consider When Creating a Selection Filter

All selection filters are built by specifying one or more comparison statements. To create comparison statements, you must decide each of the following:

- **Table (database):** which table the field is in, e.g., Main (DP.DBF), Address (DPADD.DBF), Gifts (DPGIFT.DBF), etc. To see a list of which fields are in which tables, see page 277.
- **Specific field:** the field in which the data is stored (for example, Record Type, Flags, GL, or AMT).
- **Comparison operator:** the operator (for example, equals, greater than, between, etc.) you need to use to find the appropriate records.

- **Comparison value:** the value you are looking for or want to compare. For example, if you're looking for records that have a flag of BD (board member), BD is the comparison value.



## Setting a Selection Filter

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In DonorPerfect, you have several options when running selection filters: use a previously saved filter, use the last filter you used, or build a new filter.

### Reusing the Previous Selection Filter

DonorPerfect gives you the option to use the last filter you created. This is particularly useful if your last filter was lengthy, and you need to use it again or make slight changes to it. If you use passwords, then the last filter is set per user. This allows each user to pull up the last filter they created. If you don't use passwords (single user version only), the last filter is the one used by anyone in the DonorPerfect system.

► **To use the last filter**

1. From the screen where you need to create a selection filter, select the **Set Selection Filter** check box. The **Selection Criteria Screen** appears.
2. Click the Use Last Filter button. The Selection Verification Screen appears.
3. Make any necessary changes to the filter.
4. Click **OK**.

### Selecting a Previously Saved Selection Filter

In DonorPerfect, you can use saved filters for common selections.

► **To use a saved selection filter**

1. From the screen where you want to use a saved selection filter, select the **Set Selection Filter** check box. The **Selection Criteria Screen** appears.
2. Double-click on the saved filter you want to run. The **Selection Verification Screen** appears.
3. Click **OK**.

### Building a New Selection Filter

The process of building a new selection filter is identical for running lists, mailings, and reports.

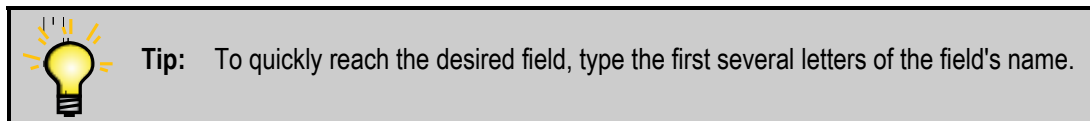
► **To build a new selection filter**

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

Filter Name	Created by	Date
\$500 gifts made this calendar year	DPW	06/20/2005
\$5000+ Grand Total Givers	DPW	03/01/2006
3 Year Donor Report	DPW	10/10/2004
Auction Donations	DPW	02/09/2005
Birthday's this month	DPW	06/20/2005
Board gifts over \$500	DPW	06/08/2005
Board Member (Present and Past)	DPW	03/01/2006
Board Members	DPW	01/19/2005
Building Fund Donors	DPW	11/23/2004
End of Year 2005	DPW	12/31/2005
End of Year 2006	DPW	12/31/2004
End of Year 2007		06/30/2008
End of Year 2008		06/30/2008

2. Select the Build a Selection Filter check box. The DP Selection Screen appears.

3. In section 1, double-click the table that contains the field you want to filter on.
4. In section 2, double-click the field you want to filter on.





**Note:** To list fields by their names instead of their descriptions (for example, GTOT instead of Grand Total), click the **By Field Name** check box. This is helpful for experienced users who are more familiar with the field's actual name than its description on entry screens.

5. In section **3**, double-click the comparison operator (for example, = or >) you want to use. See page 124 for information on operators.
6. In section **4**, enter a value for comparison. You can also press F2 or right-click in the field to see a list of possible values for the field.



**Tip:** The comparison values are case sensitive. If necessary, use the SHIFT or CAPS LOCK key to change the case of the letters you enter.

7. In section **5**, click one of the following buttons:
  - **Finished** - This was the last selection statement you were adding, so you are finished and ready to go to the Selection Verification Screen (Step 9).
  - **AND** - You plan to add another selection statement to the filter, using a logical statement like "if A and B are true then this record will appear in the report."
  - **OR** - You want to add another selection statement to the filter, using a logical statement like "if A or B are true, then this record will appear in the report."
8. If you clicked the **AND** or **OR** buttons, repeat steps 3–7.
9. If you chose **Finished, go to Verify Selection**, the Selection Verification screen appears:

10. Review the filter settings and make changes if necessary.

- a. If the **Address** table was selected, a **Main Address Only** checkbox appears. Check this box to filter out any additional address records from your output.
- b. If the **Gifts** table was selected, an **Exclude Non-Gifts** checkbox appears. Check this box to filter out all soft credits, pledges, matching gifts, and notifications from your output.

**Important!**

The system might automatically include criteria that you did not enter yourself. For instance, **dpadd.priority="1"** selects only primary addresses and **dpgift.rectype="G"** excludes pledges and soft credits

Also, if you used both the **AND** and **OR** operators in your filter, you'll need to use parentheses to make sure the filter executes in the correct order. See "Combining ANDs and ORs in a Selection Statement" page 128 for information about the proper placement of parentheses.

11. Once you have finished making changes, click the **OK** button to finish creating the selection filter. You will be returned to the screen on which you checked the **Set Selection Criteria** checkbox. The new selection filter will be enabled, and only records that match its selection criteria will be displayed.



**Note:** You can also click the **Save Filter** button to finish creating the filter and save it for reuse. See "Saving a Selection Filter" page 127 for details.

### Operators Available for Use with Selection Filters

DonorPerfect allows you to use many different types of operators to compare values in the system.

#### Operators for Single-Valued Fields

Many fields in DonorPerfect can only contain one value (for example, Gift Amount or Zip Code). The following table lists the operators you can use with single-valued fields:

Single-Valued Field Operator	Description
equal to (=)	<p><b>For numeric fields</b>, finds records where the value in the field is equal to the value specified.</p> <p><b>For character fields</b>, finds records that <i>begin</i> with the characters specified.</p> <p><b>Example: Zip=951</b> finds records in which the Zip Code <i>begins</i> with 951. Accordingly, it will find records with Zip Codes of 95111, 95112, 95167, and so on but not 95211, 95951, and so on.</p>
not equal (#)	<p><b>For numeric fields</b>, finds records where the value in the field is not equal to the value specified.</p> <p><b>For character fields</b>, finds records excluding those records that begin with the character specified.</p>

Single-Valued Field Operator	Description
<b>less than (&lt;)</b>	<p><b>For numeric fields</b>, finds values less than but NOT including the values specified.</p> <p><b>For character fields</b>, finds records where the character string is alphabetically less than but NOT including the characters specified.</p> <p><b>For date fields</b>, finds records where the date is earlier than the value specified.</p>
<b>less than or equal to (&lt;=)</b>	<p><b>For numeric fields</b>, finds values less than OR equal to the values specified.</p> <p><b>For character fields</b>, finds records where the character string is alphabetically less than OR equal to the characters specified.</p> <p><b>For date fields</b>, finds records where the date is less than OR equal to the value specified.</p>
<b>greater than (&gt;)</b>	<p><b>For numeric fields</b>, finds values greater than but NOT including the values specified.</p> <p><b>For character fields</b>, finds records where the character string is alphabetically greater than but NOT including the characters specified.</p> <p><b>For date fields</b>, finds records where the date is more recent than the value specified.</p>
<b>greater than or equal to (&gt;=)</b>	<p><b>For numeric fields</b>, finds values greater than OR equal to the values specified.</p> <p><b>For character fields</b>, finds records where the character string is alphabetically greater than OR equal to the characters specified.</p> <p><b>For date fields</b>, finds records where the date is greater than OR equal to the value specified.</p>
<b>between (BT)</b>	<p>When selected, you enter a range of values for the search, and the filter selects records whose value is within the range, including the values specified.</p> <p><b>Example: GTOT BT 100-500</b> finds all donors whose giving grand total (GTOT) falls between \$100 and \$500 (inclusive). This operator is also helpful when selecting between a range of dates.</p>
<b>in list of options (IN)</b>	<p>This operator saves you from a lengthy OR statement such as ST=CA OR ST=AZ OR ST=NV. Use this if the field you are searching only contains one value.</p> <p><b>Example: St IN CA,AZ,NV</b> finds all records with the states of California, Arizona, or Nevada.</p> <p>The <b>Find Opposite</b> check box appears when using the M\$ and IN operators. Checking this box finds all records that do NOT have the requested criteria.</p>
<b>exactly equal to (==)</b>	<p><b>For character fields</b>, finds records where ALL the characters in a field are equal to the value you enter; this is different than the equal sign, which compares just the beginning of the field.</p> <p><b>Example: ZIP==95111</b> finds records that have exactly 95111 as their Zip Code. Those with 10-digit Zip Codes that <u>begin</u> with 95111 (such as 95111-0022) will not be selected.</p>
<b>month equal to (MO)</b>	<p>Finds dates that fall in the specified month.</p> <p><b>Example: BDAT MO 9</b> finds all records with a value in the Birthdate (BDAT) field in</p>

Single-Valued Field Operator	Description
	the month of September.
<b>is blank (BL)</b>	Finds records where the designated field is blank or contains no information. <b>Example: ZIP is BL</b> finds all records with an empty Zip Code field.
<b>is blank (NB)</b>	Finds records where the designated field is not blank. <b>Example: ZIP is NB</b> finds all records with something entered in the Zip Code.
<b>TD equal to today</b>	Finds records where the designated field is equal to today's date. This operator is only available when selecting on a date field. <b>Example: DATE TD</b> finds all donors who have a gift dated with today's date.
<b>TM in this month</b>	Finds records where the designated field is in the current month. This operator is only available when selecting on a date field. <b>Example: DATE TM</b> finds all donors who have a gift dated within the current month.
<b>TY in this year</b>	Finds records where the designated field is in the current calendar year. This operator is only available when selecting on a date field. <b>Example: DATE TY</b> finds all donors who have a gift dated within the current year.
<b>TW in this week</b>	Finds records where the designated field is in the current week. This operator is only available when selecting on a date field. <b>Example: DATE TW</b> finds all donors who have a gift dated within the current week.

### Operators for Multi-Valued Fields

Some DonorPerfect fields allow you to enter multiple values in a single field (for examples, FLAGS or NARR). The following table lists the operators you can use with multi-valued fields:

Multi-Valued Field Operator	Description
<b>contains (\$)</b>	Finds records where one criteria appears <u>anywhere</u> in the field. <b>Example 1: Flags \$ "BD"</b> - finds all records where "BD" (board member) is within FLAGS field, regardless of where it appears in the field. <b>Example 2: Narr \$ "bequest"</b> - finds all records where the word "bequest" appears anywhere within the narrative field.
<b>does not contain (N\$)</b>	Selects records that do NOT contain the criteria you enter. <b>Example: Flags N\$ "BD"</b> - finds all records that do not have "BD" in FLAGS field.

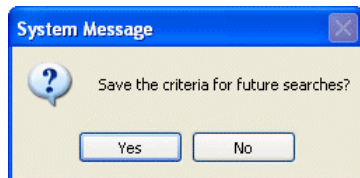
Multi-Valued Field Operator	Description
multiple contains (M\$)	<p>This operator saves the user from a lengthy OR statement such as <b>Flags\$"BD" or Flags\$"AM" or Flags\$"GT"</b>. Use this instead of the <b>IN</b> (In List of Options) when the field can contain more than one value.</p> <p><b>Example: Flags M\$ "BD","AM","GT"</b> finds all records with Flags of BD, AM, or GT.</p> <p>The <b>Find Opposite</b> check box appears when using the M\$ and IN operators. Checking this box finds all records that do NOT have the requested criteria.</p>

## Saving a Selection Filter

Any set of selection criteria can be given a name and saved.

### ► To save a selection filter

1. On the Selection Verification Screen, click the **Save Filter** button. The following message appears:



2. Click **Yes**. An expanded version of the Selection Verification screen opens:

 A larger dialog box titled "Selection Verification Screen" with a blue title bar and a close button. It contains several fields:
 

- Filter Name:** An empty text input field.
- Shared?:** A checked checkbox.
- Created by:** A text field containing " / /".
- Filter Group:** A dropdown menu showing "Unassigned Filters" and an "Edit Filter Groups" button.
- User Group:** An empty text input field.
- Description:** A large text area containing the filter criteria: "dpadd.priority='1' and ('Philadelphia'\$dpadd.city)".
- Main Address Only:** A checked checkbox.

 An "OK" button is located at the bottom right of the dialog.

3. In the **Filter Name** field, enter a name for this filter. If the filter name already exists, a warning message appears, and you will have to use a different name.
4. If you want to share the filter with other DonorPerfect users, select the **Shared** check box. If you use passwords and you don't share the filter, you'll be the only user who can access this filter. When you access the shared filter via the Selection Criteria Screen, you'll see which user created the filter and on what date.
5. Select the **Filter Group** you want to save the filter in. Click the **Edit Filter Groups** button to edit filter groups. (For details on editing filter groups, see "Editing Filter Groups" page .)
6. If you want to restrict the use of this filter to certain user groups, enter the group number in the **User Group** field. For more information on groups, see "Managing User Groups" in the *DonorPerfect Administrator's Guide*. The user group restricts display and use of the filter to users who are in a particular group.
7. In the **Description** field, enter a lengthier description that will appear when the saved filter is highlighted. This description is optional, but recommended.



**Note:** The selection statement and related fields appear beneath the **Description** field, but it should not be necessary to edit them.

8. Click **OK**.

## Clearing the Current Selection Filter

To stop using a selection filter that has been set for a screen, uncheck the **Set Selection Filter** checkbox. The filter will be disabled, and all available records will now display in the output from that screen.

## Advanced Uses of Selection Filters

See the following sections for details on the advanced uses of selection filters:

- Combining ANDs and ORs in a selection filter
- Running Two-Pass selection filters

### Combining ANDs and ORs in a Selection Statement

If you are trying to find records that have multiple characteristics, you can use ANDs and ORs in your selection filters. Depending on how you set up your statement, the records may meet all the criteria you include or only certain portions of the criteria. Here are three examples of AND/OR selection statements:

- Donor either lives in Pennsylvania OR gave over \$100
- Donor has a grand total greater than \$100 AND lives in Pennsylvania
- Donor lives in Pennsylvania OR Maryland AND gave more than \$100



Keep the following in mind when using ANDs and ORs in selection filters:

- If **AND** is selected, then all selection statements connected by an operator must be true for the record to match.
- If **OR** is selected, then any one of the selection statements connected by an operator must be true for the record to match. Using OR will result in more matching records.

To remember the difference between using ANDs and ORs, remember that a person looking for a car that is “practical or economical or sporty” will have a much easier time finding a car than someone who is looking for a car that is “practical and economical and sporty”!

If you have both ANDs and ORs in your selection filter, you’ll need to use parentheses in order to make sure the system executes the filter in the correct order. You place these on the **Selection Verification Screen**. As you can see in the following examples, the placement of the parentheses significantly changes the search outcome:

Sample Filter	Filter Description	Explanation
<b>(dp.type = "IN" or dp.type = "CO") and dp.gtot &gt; 100</b>	(Donors who are individuals or companies) and donors who gave more than \$100.	The system finds donors who have either <b>IN</b> (individual) <u>OR</u> <b>CO</b> (company) in the Type field <u>AND</u> have given more than \$100.
dp.type = "IN" or <b>(dp.type = "CO" and dp.gtot &gt; 100)</b>	Donors who are individuals or (donors who are companies and gave more than \$100).	In this example, the system finds all records that have <b>IN</b> in the Type field, as well as all records that have both <b>CO</b> in the Type field <u>AND</u> have given more than \$100.
<b>((dp.type= "IN" and dp.ytd&gt; 0) or "VIP"\$dp.flags)</b>	(Donors who are individuals and have a year-to-date giving greater than 0) or donors who are flagged as VIP.	This filter will find only those donors who are individuals <u>AND</u> have a year-to-date giving greater than 0, as well as donors who have a flag of VIP.
(dp.type= "IN" or <b>(dp.ytd&gt; 0 and "VIP"\$dp.flags)</b> )	Donors who are individuals or (donors who have a year-to-date giving greater than 0 and are flagged as VIP).	This filter will find only those donors who are individuals, as well as donors who have a year-to-date giving greater than 0 <u>AND</u> who have a flag of VIP.

## Running Two-Pass Selection Filters

You can use two-pass selection filters to find or exclude records that match a complex set of criteria. To use two-pass selection filters, you’ll need to use the Tag Date. Using the Tag Date in a selection filter consists of two parts:

- **First-pass:** create a selection filter that selects a group of records that meet a certain set of criteria; then, mark the selected records with the Tag Date you’ve chosen.
- **Second-pass:** create another filter that excludes or includes a group of records based on the Tag Date that you set.

The following situation is an example of when you would use a two-pass selection filter: you need to select donors who have given 2 different types of gifts: BANQ (Banquet) and MM01 (Membership Mailing 1). To find these records, you must first create a selection filter that finds donors who gave a BANQ gift and update the Tag Date for those records. Then, you must create a second selection filter that finds records that match the Tag Date you just updated and have given a MM01 gift. If you tried selecting gifts with a Solicitation of BANQ OR MM01, you would get anyone with either gift, but not necessarily both. If you selected BANQ AND MM01, you would get a message that “No Records were found. . . .” Since each gift has only one solicitation code, no gift could have both BANQ AND MM01. This example is illustrated in the instructions below.

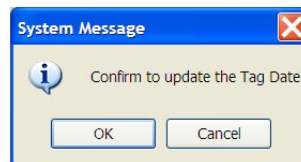
► **To run a two-pass selection filter**

1. From the Listings and Mailings screen, select the **Update Tag Date** check box.
2. In the date field next to **Update Tag Date**, enter a Tag Date with which you want to update the records you will select from your database. The field defaults to today’s date; you can leave that date or enter another date. Just make sure the date is unique, so that no other records in the system have that value. Be sure that you don’t use a Tag Date that you’ve previously used. If you do, it’s possible that records you don’t want will be selected as part of your filter; this will make your results inaccurate.
3. If you are updating a date field that you have added to your DP table, enter the field name in the **Tag Field** box. If you are using the Tag Date field that comes with your system, leave the default value of TAG\_DT in the field.

4. If you want to include names that are marked as NO MAIL, check the **Include “NO MAIL” Names** box.
5. Select the Set Selection Filter check box. The Selection Criteria Screen appears.
6. Select the Build a Selection Filter check box. The DP Selection Screen appears.

#### *Defining the First-Pass*

7. Define your filter to include the records that you want to update with the Tag Date:
  - In section **1**, double-click **Gifts**.
  - In section **2**, double-click **Solicitation Code**.
  - In section **3**, double-click = **equal to**.
  - In section **4**, enter **BANQ**.
8. In section **5**, select **Finished, go to Verify Selection**, and then click **Continue**. The Selection Verification Screen appears.
9. Click **OK**.
10. Click **Preview** or **Print**, depending on what action you're performing. A message appears, confirming that you want to update the Tag Date.



11. Click **OK**. The labels, mail merge, or report appears, showing you the number of records for which you updated the Tag Date.

**12.** Close the labels, mail merge, or report. You are returned to the **Listings and Mailings** screen.

**13.** Clear the **Update Tag Date** check box.

*Defining the Second Pass*

**14.** Select the **Set Selection Filter** check box to define the filter for the second pass.



**15.** Select the Build a Selection Filter check box. The DP Selection Screen appears.

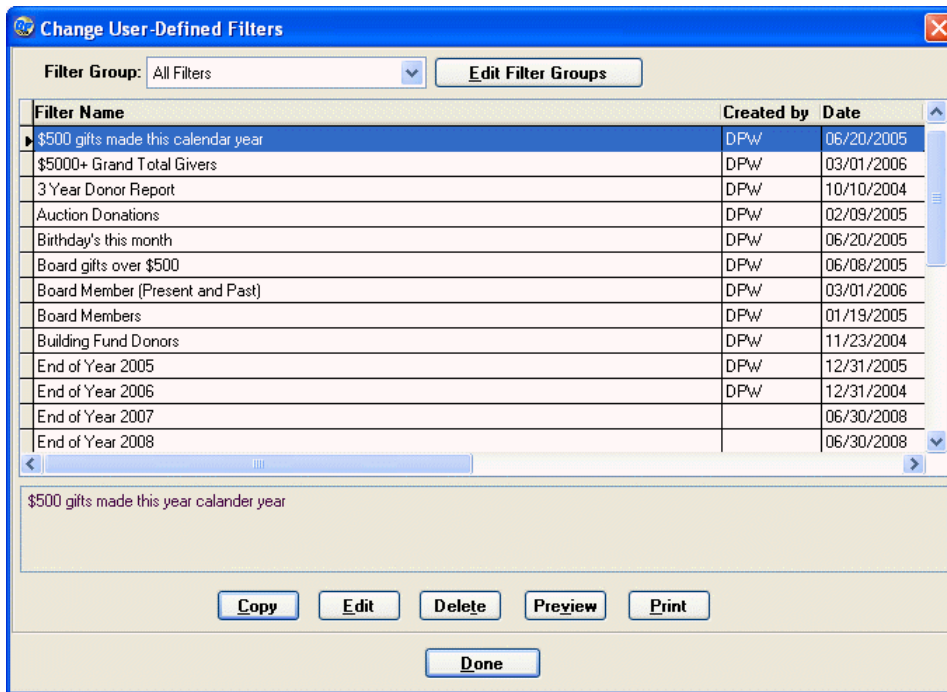
**16.** Define the second-pass of your filter:

- In section **1**, double-click **Main**.
- In section **2**, double-click **Tag Date**.
- In section **2**, double-click = equal to.
- In section **4**, enter the Tag Date with which you updated records in the first pass.
- In section **5**, select Add another criteria to the filter using “AND” and then click Continue.
- In section **1**, double-click **Gifts**.
- In section **2**, double-click **Solicitation Code**.
- In section **3**, double-click = equal to.
- In section **4**, enter **MM01**.

**17.** In section **5**, select **Finished, go to Verify Selection**, and then click **Continue**. The **Selection Verification Screen** appears. Click **OK**. When you run the listing, mail merge, or report, the system finds the appropriate records based on the criteria you entered for your two-pass selection filter.

## Managing Selection Filters

The Change User-Defined Filters screen allows you to perform a number of filter-related tasks.



To access the screen, click on the **Utilities** button, and select **Edit User-Defined Filters**.

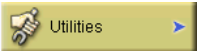
The screen displays all of the filters in the **Filter Group** that is currently selected. Selecting **All Filters** displays all saved filters that are available to you.

To exit the screen, click the **Done** button.

### Editing a Saved Selection Filter

You can easily modify a selection filter that you've previously saved.

#### ► To edit a saved selection filter

1. Click the **Utilities** button , then click **Edit User-Defined Filters**.
2. Highlight the selection filter you want to change, and click the **Edit** button. An expanded version of the Selection Verification Screen opens:

3. Edit the name for the filter in the **Filter Name** field.
4. If you want to share the filter with other DonorPerfect users, select the **Shared** check box. If you use passwords and you don't share the filter, you'll be the only user who can access this filter. When you access the shared filter via the Selection Criteria Screen, you'll see which user created the filter and on what date.




**Note:** You can only edit the **Shared** checkbox if you created the selection filter. If the filter was created by another user, the **Shared** box will be disabled.

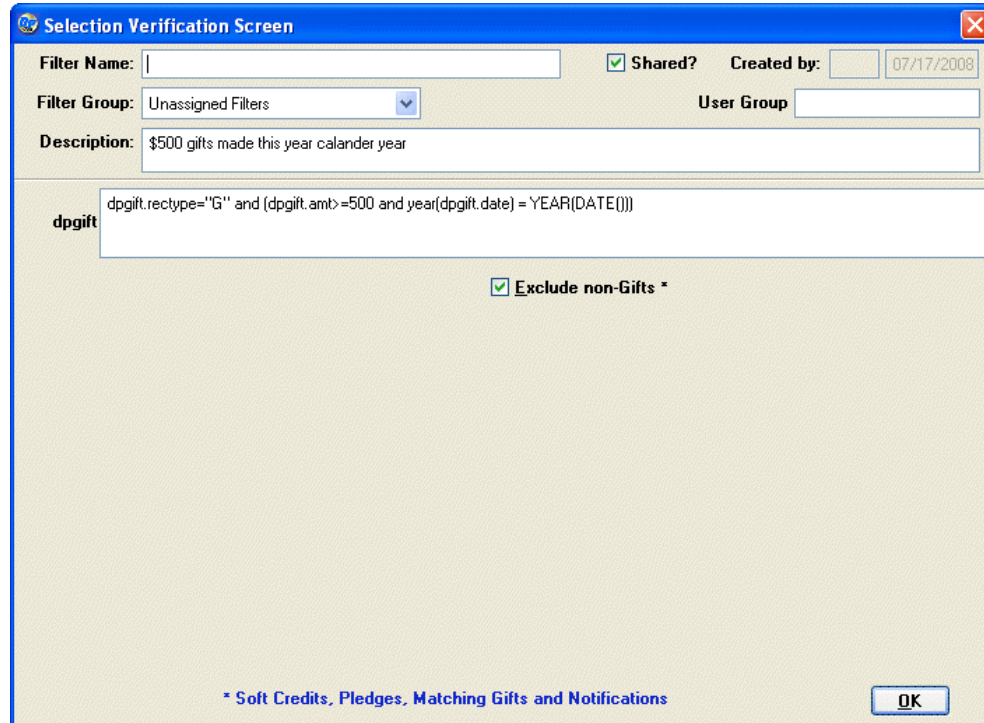
5. Select the **Filter Group** you want to save the filter in.
6. If you want to restrict the use of this filter to certain user groups, enter the group number in the **User Group** field. For more information on groups, see "Managing User Groups" in the *DonorPerfect Administrator's Guide*. The user group restricts display and use of the filter to users who are in a particular group.
7. In the **Description** field, enter a lengthier description that will appear when the saved filter is highlighted, if desired.
8. Edit the actual filter function in the field(s) below the divider line.
9. Check **Exclude Non-Gifts** to filter out all soft credits, pledges, matching gifts and notifications.
10. Click **OK**.

## Copying a Saved Selection Filter

If you need to create a selection filter that is similar to one you've already saved, you can copy the existing selection filter and then make the necessary changes.

### ► To copy a saved selection filter

1. Click the **Utilities** button , then click **Edit User-Defined Filters**.
2. Highlight the selection filter you want to copy, and click the **Copy** button. An expanded version of the Selection Verification Screen opens:



The screenshot shows the "Selection Verification Screen" dialog box. It includes the following elements:


- Filter Name:** An empty text input field.
- Filter Group:** A dropdown menu currently showing "Unassigned Filters".
- Description:** A text area containing "\$500 gifts made this year calander year".
- Filter Expression:** A large text area containing the SQL-like expression: `dpgift.rectype='G'' and (dpgift.amb>=500 and year(dpgift.date) = YEAR(DATE()))`.
- Shared?:** A checked checkbox.
- Created by:** A text field containing "07/17/2008".
- User Group:** An empty text input field.
- Exclude non-Gifts \*:** A checked checkbox.
- Footer:** A note that reads "\* Soft Credits, Pledges, Matching Gifts and Notifications" and an "OK" button.

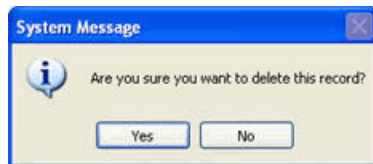
3. In the **Filter Name** field, enter a name for this filter. If the filter name already exists, a warning message appears, and you will have to use a different name.
4. If you want to share the filter with other DonorPerfect users, select the **Shared** check box. If you use passwords and you don't share the filter, you'll be the only user who can access this filter. When you access the shared filter via the Selection Criteria Screen, you'll see which user created the filter and on what date.
5. If you want to restrict the use of this filter to certain user groups, enter the group number in the **User Group** field. For more information on groups, see "Managing User Groups" in the *DonorPerfect Administrator's Guide*. The user group restricts display and use of the filter to users who are in a particular group.
6. In the **Description** field, enter a lengthy description that will appear when the name is highlighted, if desired.
7. Make the desired changes, and click **OK**.

## Deleting a Saved Selection Filter

If you no longer need to keep a saved selection filter in the system, you can delete it.

### ► To delete a saved selection filter

1. Click the Utilities button , then click **Edit User-Defined Filters**.
2. Highlight the selection filter you want to delete, and click the **Delete** button. A confirmation screen appears:



3. Click **Yes**. The filter is deleted.

## Printing the Listing of User-Defined Selection Filters

06/30/2008	Your Organization Name Here	PAGE: 1
Listing of User-Defined Filters		
Displaying: End of Year Filters		
Filter Name		
End of Year 2005	dpgift.rectype="G" and (between(dpgift.date,(dt1),(dt2)))	
End of Year 2006	dpgift.rectype="G" and (between(dpgift.date,(dt1),(dt2)))	
End of Year 2007	dpgift.rectype="G" and (between(dpgift.date,(dt1),(dt2)))	
End of Year 2008	dpgift.rectype="G" and (between(dpgift.date,(dt1),(dt2)))	

The Listing of User-Defined Selection Filters is a report that lists all of the filters that are currently displayed in the Change User-Defined Filters screen. The filter name is listed, along with the actual selection statement.

The report displays all filters in the filter group that is currently selected in the Change User-Defined Filters screen. The name of the currently selected filter group is shown in the Displaying: title at the top of the report.

### ► To preview the Listing of User-Defined Filters

1. Click the **Utilities** button, then click **Edit User-Defined Filters**.
2. Set **Filter Group** to the filter group you want to display in the listing, or select **All Filters** to display all filters.
3. Click the **Preview** button. The report will display in the standard report preview windows (see “Previewing a Report” for details).

### ► To print the Listing of User-Defined Filters

1. Click the **Utilities** button, then click **Edit User-Defined Filters**. The Change User-Defined Filters screen opens (see above).



2. Set **Filter Group** to the filter group you want to display in the listing, or select **All Filters** to display all filters.
3. Click the **Print** button. The report will print using the standard Print screen for reports. See “Printing a Report” for details.

## Editing Filter Groups

Filter Groups allow you to organize your saved selection filters into categories. This helps to make them easier to find.

The Maintain Filter Groups screen allows you to add, edit and delete the filter groups.

### ► To access the Maintain Filter Groups Screen

1. Click the **Utilities** button, then click **Edit User-Defined Filters**.
2. Click the **Edit Filter Groups** button. The Maintain Filter Groups screen appears:

Group Name	Description
End of Year Filters	Filters used for End of Year Reports
Mail Merge Templates	Stores filters used for monthly mailing mail merge.
Unassigned Filters	Default group for unassigned filters

**Edit** **Add Group** **Delete Group** **Done**

**Group Name:** End of Year Filters **Filters Assigned to Group:** 4

**Description:** Filters used for End of Year Reports

**Created by:** 06/30/2008

**Save** **Cancel**

### ► To add a filter group

1. Click the **Add Group** button. The fields at the bottom of the screen are cleared out so that you can enter the information for the new filter group:

Group Name	Description
End of Year Filters	Filters used for End of Year Reports
Mail Merge Templates	Stores filters used for monthly mailing mail merge.
Unassigned Filters	Default group for unassigned filters

Edit   Add Group   Delete Group   Done

Group Name:    Filters Assigned to Group:

Description:

Created by:

Save   Cancel

2. Enter the name for the filter group in the **Group Name** field.
3. Enter a brief description of what kind of filters go into the group in the **Description** field.
4. Click the **Save** button to save the new group, or click the **Cancel** button to cancel the addition.

► **To edit a filter group**

1. Select the filter group in the **Filter Groups** list.
2. Click the **Edit** button. The filter group's details appear in the fields at the bottom of the screen:

Group Name	Description
End of Year Filters	Filters used for End of Year Reports
Mail Merge Templates	Stores filters used for monthly mailing mail merge.
Unassigned Filters	Default group for unassigned filters

Edit   Add Group   Delete Group   Done

Group Name:    Filters Assigned to Group:

Description:

Created by:

Save   Cancel

3. Edit the **Group Name** and **Description**.
4. Click the **Save** button to save the changes, or click the **Cancel** button to cancel the edit operation.

► **To delete a filter group**

1. Select the filter group in the **Filter Groups** list.
2. Click the **Delete** button. A confirmation screen appears:



3. Click the **Yes** button to delete the group, or the **No** button to cancel deletion.



**Note:** If you delete a filter group, all of the filters assigned to that group will be changed to **Unassigned**.

► **To exit the screen**

1. Click the **Done** button to exit the screen.

## Sample Selection Filters

This section includes some sample selection filters that you can use to become more familiar with the concepts discussed in this chapter. Each table included in this section lists the following information for each sample selection filter:

- an explanation of which records the selection filter will find
- actual selection filter
- the table, field, operator, and comparison used in the selection filter

### Simple Selection Filters

The following table shows some simple selection filters.

Finds records where	Selection Filter	Table	Field	Operator	Comparison Value
Donor resides in Pennsylvania.	dpadd="1" and (dpadd.st="PA")	Address	ST	=	PA
Donor's grand total is greater than or equal to \$100.	(dp.gtot>=100)	Main	GTOT	>=	100
Donor's most recent contribution was on or after February 1, 2008.	(dp.ls_dt>={02/01/2008})	Main	LS_DT	>=	02/01/2008
"BD" appears in the Flags field	("BD"\$dp.flags)	Main	FLAGS	\$	BD

### Common Selection Statements

The following table details some common selection statements used in DonorPerfect. As with all selection filters, it does not matter if field names are capitalized/lower case or if there are spaces in the selection filter.

Finds records where	Selection Filter	Table	Field	Operator	Comparison Value
Donor gave this year.	(dp.ytd > 0)	Main	Ytd	>	0
Donor gave last year.	(dp.ly_ytd > 0)	Main	Ly_ytd	>	0
Donor has given a gift since January 1, 2003.	(dp.ls_dt > {01/01/2003})	Main	Ls_dt	>	01/01/2003
Donor gave last year but not this year.	(dp.ytd = 0 and dp.ly_ytd > 0)	Main	Ytd	=	0
		Main	Ly_ytd	>	0
Donor's last name begins with "S" through "Z."	dpadd.priority="1" and (dpadd.lname >="S")	Address	Lname	>=	S
Donor does not have a solicitor.	empty(dp.solicitor)	Main	Solicitor	BL	[blank]
Donor's zip code begins with "19."	dpadd.priority="1" and (dpadd.zip = "19")	Address	Zip	=	19
Donor has a solicitor assigned. Field is not blank.	!empty(dp.solicitor)	Main	Solicitor	NB	[blank]
Donor has "VL" in Flags field.	("VL"\$dp.flags)	Main	Flags	\$	VL
Donor is not a board member. Flag field does not contain "BD."	( ! "BD"\$dp.flags)	Main	Flags	N\$	BD

### Sample Gift History Selection Filters

The following table lists some common selection filters used to find gift records.

Find records where	Selection Filter	Table	Field	Operator	Comparison Value
Donor gave a gift between these two dates.	dpgift.rectype="G" and (between(dpgift.date,{01/01/2003},{06/30/2003}))	Gifts	Date	BT	01/01/2003 – 06/30/2003
Donor gave a gift to this solicitation code.	dpgift.rectype="G" and (dpgift.sol="AU03")	Gifts	Sol	=	AU03

Find records where	Selection Filter	Table	Field	Operator	Comparison Value
Donor never gave a gift to this solicitation code.	dpgift.rectype="G" and (never(dpgift.sol="AU03"))	Gifts	Sol	NV	AU03
Donor has at least one gift that is not this solicitation code.	dpgift.rectype="G" and (dpgift.sol# "AU03")	Gifts	Sol	#	AU03

### Advanced Selection Filters

This section details more advanced selection filters that can be used in DonorPerfect. Advanced selections are used when more than one selection filter is required to generate a specific list of donors.

#### Compound Selection Filters

A compound selection filter combine two or more filters with any combination of AND and OR operators.

Finds records where	Selection Filter	Table	Field	Operator	Comparison Value	Connector
Donor either lives in Pennsylvania or gave over \$100.	<div style="border: 1px solid gray; padding: 5px;"> <p>Combine with <span style="border: 1px solid gray; padding: 2px;">OR</span></p> <hr/> <p><b>dp</b> (dp.gtot &gt; 100)</p> <hr/> <p><b>dpadd</b> dpadd.priority="1" and (dpadd.st= "PA")</p> </div>	Address	ST	=	PA	OR
		Main	GTOT	>	100	
Donor has a grand total greater than \$100 and lives in Pennsylvania.	<div style="border: 1px solid gray; padding: 5px;"> <p>Combine with <span style="border: 1px solid gray; padding: 2px;">AND</span></p> <hr/> <p><b>dp</b> (dp.gtot &gt; 100)</p> <hr/> <p><b>dpadd</b> dpadd.priority="1" and (dpadd.st= "PA")</p> </div>	Main	GTOT	>	100	AND
		Address	ST	=	PA	

#### Using A Field As A Comparison

A field name may also be used as a comparison value. To do so, you must use the **Selection Verification** screen to enter the statement. It does not matter if field names are capitalized or in lower case.

The following are examples of using a field as a comparison.

Finds records where	Selection Filter	Table	Field	Operator	Comparison Value
Donor's YTD total has increased this year over last year.	(dp.ytd> Ly_ytd)	Main	Ytd	>	Ly_ytd
Donor gave more than one gift this year.	(dp.ytd> Ls_amt)	Main	Ytd	>	Ls_amt
Donor who gave last year and increased this year's gift.	(dp.ytd>dp.ly_ytd and dp.ly_ytd> 0)	Main	Ytd Ly_ytd	> AND >	Ly_ytd 0

### Using A Mathematical Equation As Part of Comparison Value

Occasionally, a mathematical equation is used as part of the comparison in a selection filter. For example, the printout is to be comprised of donors who gave 25% more this year than last year.

There are four mathematical equations available as part of the comparison portion of the selection filter. They are: \* (multiplication); + (addition); - (subtraction); and / (division). These statements can only be entered in the **Selection Verification** screen.

The following are examples of selection statements using mathematical comparisons.

Finds records where	Selection Filter	Table	Field	Operator	Comparison Value
Donor YTD giving increased by more than 25% over last year's YTD.	(dp.ytd>dp.ly_ytd*25)	Main	Ytd	>	Ly_ytd*.25
Donor's total of the past two years giving is more than \$1,000.	(dp.ytd+dp.ly_ytd> 1000)	Main	Ytd+Ly_ytd	>	1000

### Customizing Descriptions for Selection Filter Fields

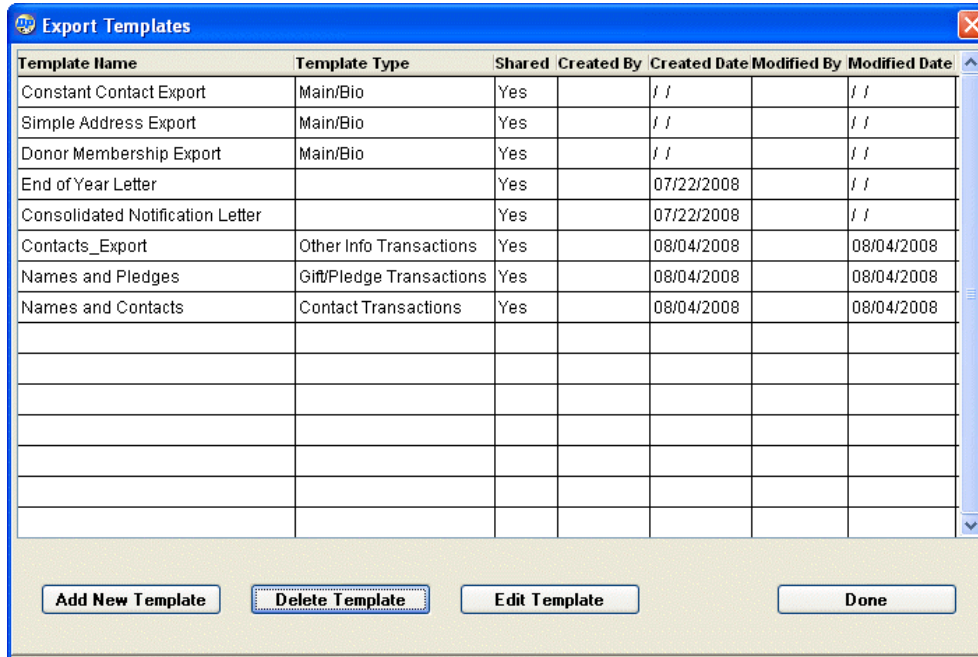
You can customize the field descriptions that appear on the DP Selection Screen, where you set up selection filters. For details, see "Defining Field Name Descriptions" in the "Defining Parameters" chapter of the *DonorPerfect Administrator's Guide*.

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blank.

# 7. Producing Communications & Mail Merges

This chapter details how to use the system to produce communications and mail merges.

## Managing Export Templates



Template Name	Template Type	Shared	Created By	Created Date	Modified By	Modified Date
Constant Contact Export	Main/Bio	Yes		1/1		1/1
Simple Address Export	Main/Bio	Yes		1/1		1/1
Donor Membership Export	Main/Bio	Yes		1/1		1/1
End of Year Letter		Yes		07/22/2008		1/1
Consolidated Notification Letter		Yes		07/22/2008		1/1
Contacts_Export	Other Info Transactions	Yes		08/04/2008		08/04/2008
Names and Pledges	Gift/Pledge Transactions	Yes		08/04/2008		08/04/2008
Names and Contacts	Contact Transactions	Yes		08/04/2008		08/04/2008

Buttons: Add New Template, Delete Template, Edit Template, Done

The Export Templates screen allows you to add, edit, copy or delete the export templates in your DonorPerfect system.

### ► To access the Export Templates screen

1. From the main screen, click the **Mailings** button and select **Export Templates**.

## Adding an Export Template

The Export Templates screen allows you to create a new export template.

You can add fields from the Main and Address tables, reorder the fields, remove fields, and apply formulas to the fields.

If you select a Financial, Contacts or Other Info template type, you can also add fields from the relevant table to the export template.

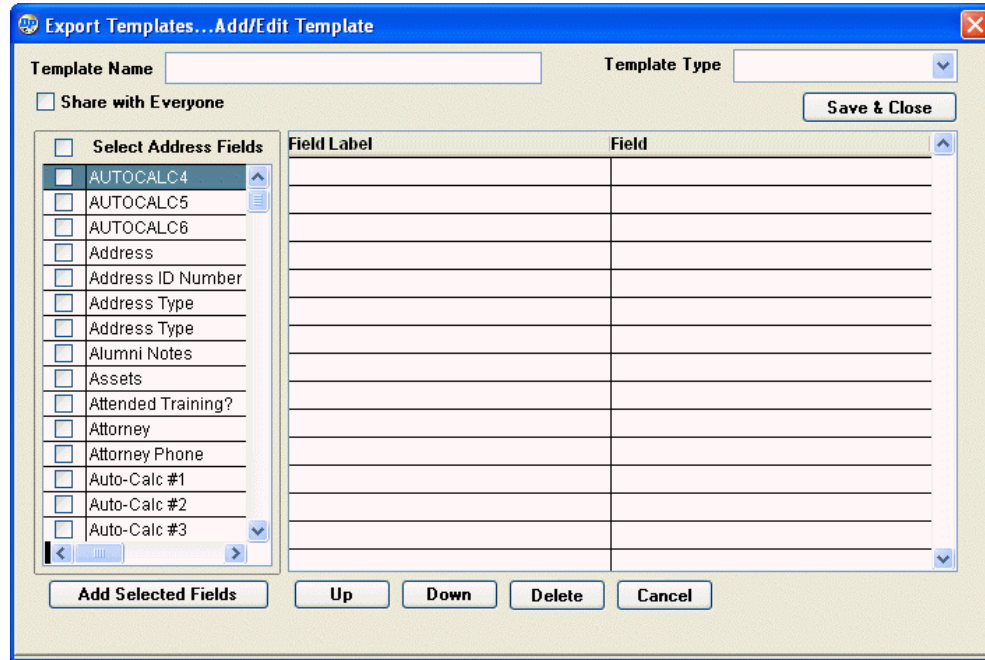


**Note:** You can arrive at this screen from the main Export Templates screen, the Export to File (dbf,xls,txt) screen, or the Export to File (csv) screens. If you arrived here from the latter two screens, skip step 1.



► To add an export format

1. On the Export Templates screen, Click the **Add New Template** button. The Add/Edit Templates screen appears where you can create a new template:



2. Check the **Share with Everyone** field to share the new template with the other users on the system. If this option is not checked, only you will be able to use the template.
3. Enter a **Template Name** for the new template.
4. Select a **Template Type**:

Template Type	Description
<b>Main/Bio</b>	A standard export template, containing information from the Main, Address and Bio data entry screens.
<b>Gift/Pledge Transactions</b>	An export template that contains information from the Main, Address and Bio data entry screens, plus transactional information from gift and pledge records. If this template type is selected, a <b>Select Gift Fields</b> button will appear at the bottom of the screen.
<b>Contact Transactions</b>	An export template that contains information from the Main, Address and Bio data entry screens, plus information from contact records. If this template type is selected, a <b>Select Contact Fields</b> button will appear at the bottom of the screen.
<b>Other Info Transactions</b>	An export template that contains information from the Main, Address and Bio data entry screens, plus information from the Other Info screen. If this template type is selected, a <b>Select Other Info Fields</b> button will appear at the bottom of the screen.

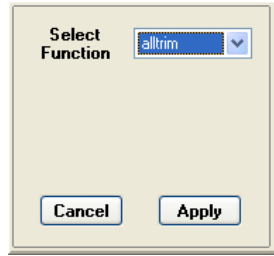


**Note:** If you came to this screen from the Export to File (dbf,xls,txt) or Export to File (csv) screens, the **Template Type** will already be selected for you.

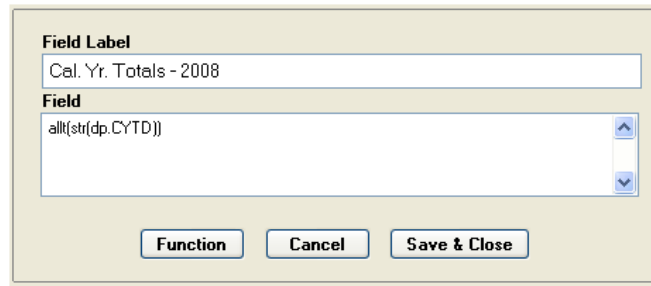
5. Select the fields from the Main and Address tables that you want to include in the template:
  - a. In the **Select Address Fields** column, check the fields you want to include in the export. Checking the box in the **Select Address Fields** column header checks all fields. Clearing the box in the **Select Address Fields** column header unchecks all fields.
  - b. Click the **Add Selected Fields** button to add the fields to the report.
  - c. Repeat as necessary until all fields are added to the report.
6. To change the order of the fields in the template:
  - a. Select a field you want to move to a different position in the right-hand list.
  - b. Use the **Up** and **Down** buttons to move the field to the desired position.
7. To remove a field from the template:
  - a. Select the field in the right-hand list.
  - b. Click the **Delete** button.
8. To edit the field label, or set the export template to apply a formula to the contents of a field:
  - a. Double-click on the field in the right-hand list. A pop-up screen appears:


The screenshot shows a dialog box titled "Field Label". It has two input areas: a text box containing "Cal. Yr. Totals - 2008" and a dropdown menu showing "dp.CYTD". At the bottom of the dialog are three buttons: "Function", "Cancel", and "Save & Close".

- b. To edit the field label:
      - i. Edit the text in the **Field Label** field.
      - ii. Click the **Save & Close** button to close the pop-up screen and return to the Export Templates screen.
    - c. To set the export template to apply a formula to the contents of a field when an export file is created:
      - i. Click the **Function** button. A second pop-up screen appears:



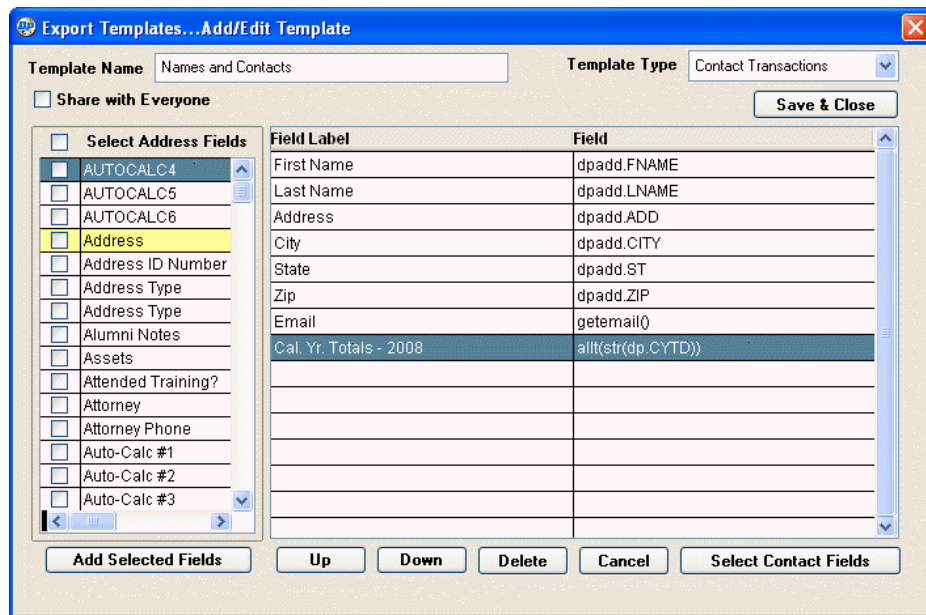
- ii. Select a function from the **Select Function** list. Depending on the function, you may be given additional fields to fill out.
- iii. Click the **Apply** button. The function pop-up screen closes, and the function can be seen applied to the field in the previous pop-up screen:





**Note:** FoxPro functions can also be entered directly into the Field field. This requires FoxPro programming expertise. For an introduction to FoxPro functions, see “FoxPro Functions” in the *DonorPerfect Administrator’s Guide*.

- iv. Click the **Save & Close** button to close the pop-up screen and return to the Export Templates screen. The function will be visible in the **Field** field in the right-hand list:



9. If you selected the **Financial**, **Contact** or **Other Info** template types, you can select additional fields from the relevant tables:
  - a. Click the **Select Gift Fields**, **Select Contact Fields**, or **Select Other Info Fields** button. The Export Templates screen will refresh, and the **Select Address Fields** list will be replaced by a **Select Gift Fields**, **Select Contact Fields**, or **Select Other Fields** list. The fields from the Main and Address tables will no longer be displayed:

The screenshot shows a dialog box titled "Export Templates...Add/Edit Template". At the top, there is a "Template Name" field containing the text "Fred". Below this is a list of fields with checkboxes, under the heading "Select Contact Fields". The fields listed are: Activity (checked), Amount Funded, Bcomm, By whom, Completed Date, Created By - Othr2, Created Dt - Othr2, Date Entered, Date Funded, Date Submitted, Deleted By - Othr2, Deleted Dt - Othr2, Denied Date, Document, and Donor ID #. To the right of this list is a table with two columns: "Field Label" and "Field". The table is currently empty. At the bottom of the dialog, there are several buttons: "Add Selected Fields", "Up", "Down", "Delete", "Cancel", and "Select Main/Address Fields".

- b. Add and sort fields from the table in the same way as before (see above).
  - c. When finished, click the **Select Main/Address Fields** button.
10. When you're finished defining the fields to include in the export, click the **Save & Close** button to save your changes and return to the Export Templates screen.

## Editing an Export Template

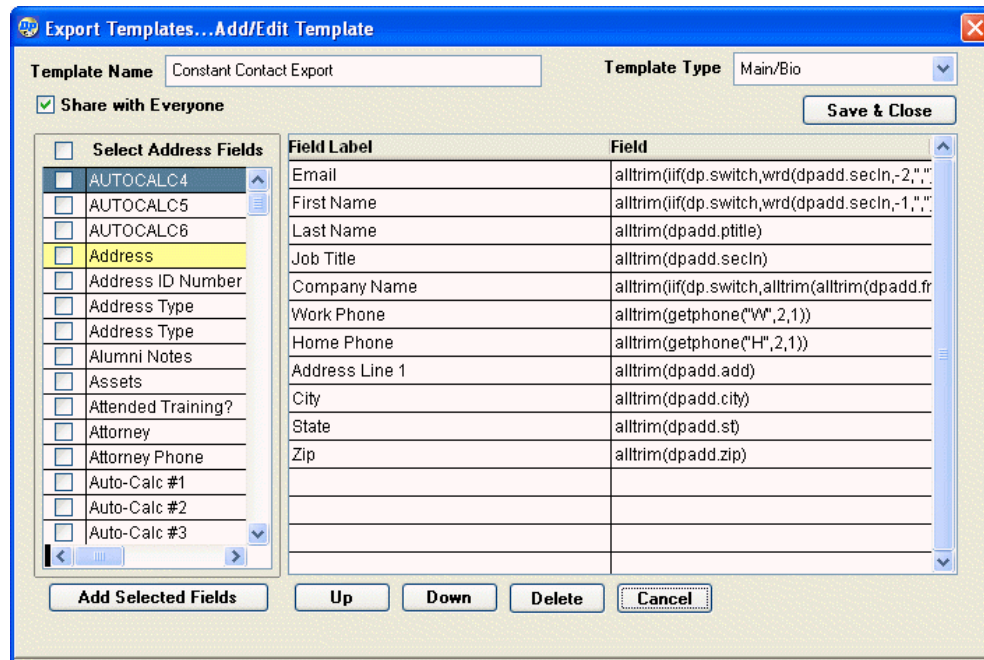
You can edit export templates that you've already saved.



**Note:** You can arrive at this screen from the main Export Templates screen, the Export to File (dbf,xls,txt) screen, or the Export to File (csv) screens. If you arrived here from the latter two screens, skip steps 1 and 2.

### ► To edit an export format

1. On the main Export Templates screen, select the export template you want to edit.
2. Click the **Edit Template** button. The Add/Edit Templates screen appears, containing the fields from the selected template:



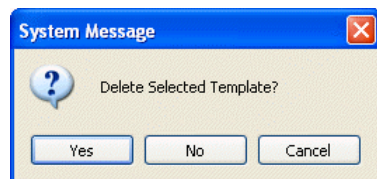
3. Make the necessary changes to the fields included in the export template. See “Adding an Export Template” page 144 for details.
4. When finished, click the **Save & Close** button to save your changes and return to the Export Templates page.

## Deleting an Export Template

You can delete any export template that you created.

### ► To delete an export template

1. On the main Export Templates screen, select the export template you want to delete.
2. Click the **Delete Template** button. A confirmation screen appears:



3. Click the **Yes** button. The export template is deleted from the system.

## Running Group Emails

A group email allows you to send emails to a group of donors instead of printing letters to send.



**Warning!** Your email server must operate as an open relay in order to send out group emails through it from DonorPerfect. Since running as an open relay is often seen as a security risk, you should check with your IT staff to see if this is possible before continuing.

If it is not possible for your email server to operate as an open relay, you will need to send emails using some other method. It is possible to send out email using the mail merge feature in Microsoft Office, for instance.

By default, Group emails are sent to any phone entry that contains an @. See page 55 for how to enter email addresses in the phone number field. It is recommended that you use a selection statement to limit the emails to only those donors you absolutely want to send email to.

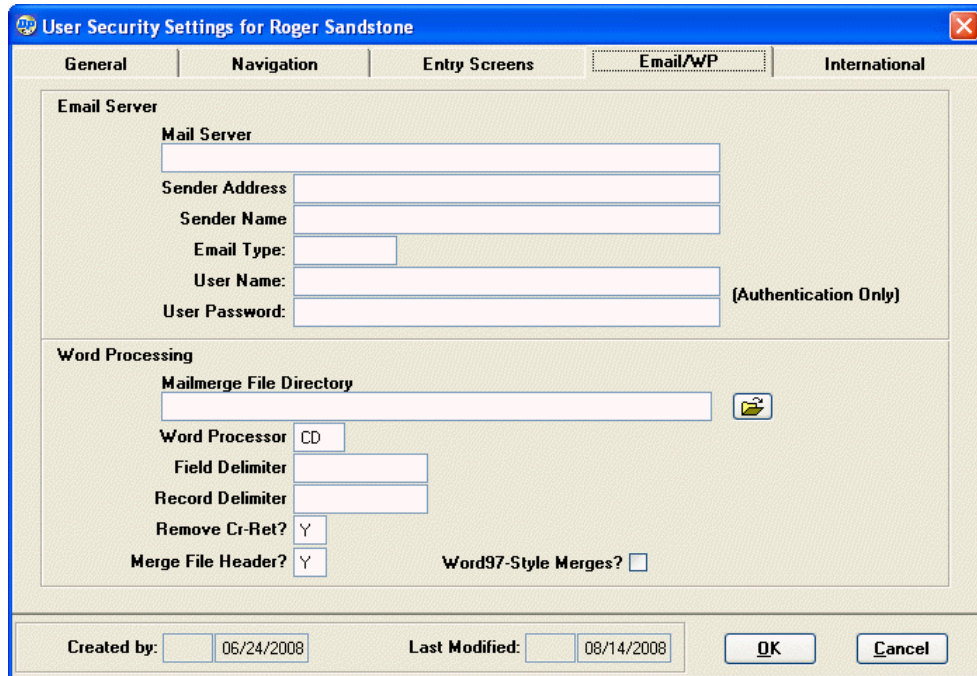
When you run group emails, it is recommended that you choose one of the “Update Last Contact” options (see “Mailing Options” on page 168 for more information). Because each email is sent separately, this helps you track to which donors the email was sent. This is especially useful if a group email is disrupted before it is completed; in this situation, you can filter out the names that have already received the email.

## Setting Up Group Emails

In order to send group emails, you’ll need to set up both password protection and define group email settings. These settings are set up separately for each DonorPerfect user, in the Email/WP tab of the User Security Settings screen (see “Managing Security” in the *DonorPerfect Administrator’s Guide* for full details on this screen).

### ► To set up group emails for a user

1. From the main screen, click the **Utilities** button, select **Change Parameters**, and then click **User Security Settings**.
2. Select the user account you want to set up group emails for, and click the **Edit** button.
3. Select the **Email/WP** tab of the User Security Settings screen.



The following user security settings affect group emails:

Setting	Description
<b>Mail Server</b>	Enter the address of your mail server. If you do not know the mail server setting, contact your Internet service provider or your network administrator.
<b>Sender Address</b>	Enter the return email address that you want to appear on emails sent through group email.
<b>Sender Name</b>	Enter the sender name that you want to appear on emails sent through group email.
<b>Email Type</b>	This option places a phrase in front of the email address, which is needed for certain email servers. To find out if you need this, contact your Internet service provide or your network administrator. If using Exchange Server, enter <b>SMTP</b> here, and <b>SMTP:</b> will precede the email address.
<b>User Name</b>	If your email server requires you to login with a user name, enter it here.
<b>User Password</b>	If your email server requires you to login, enter your password here.

- Once you have set your group email settings, click the **OK** button to save your changes.

## Sending Group Emails

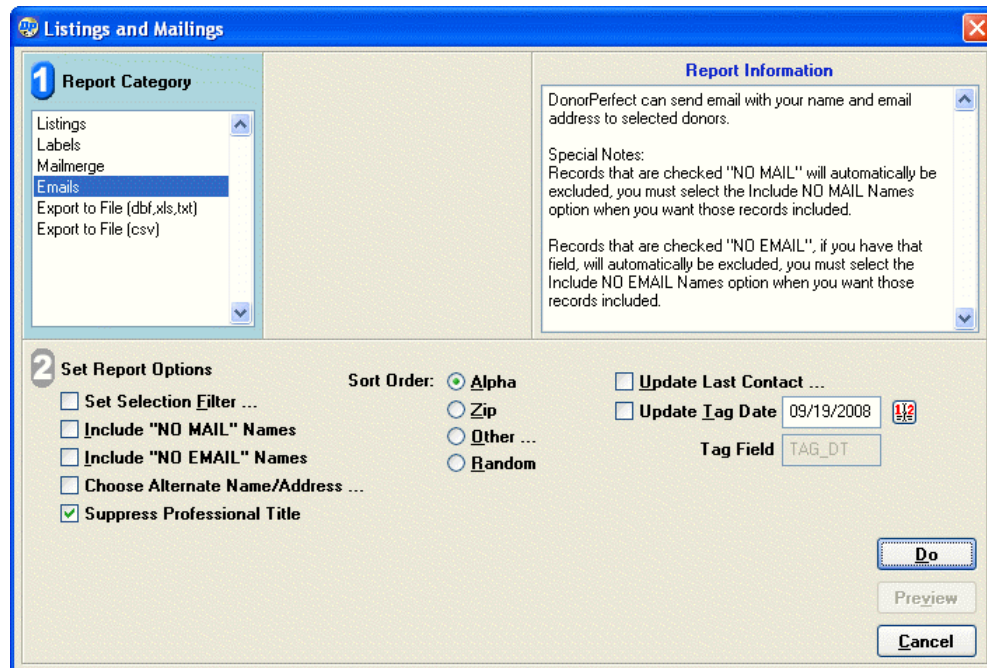
In order to send group emails, you must be connected to the Internet.

This section outlines the steps you'll need to take in order to send group emails to donors.

### ► To send group emails

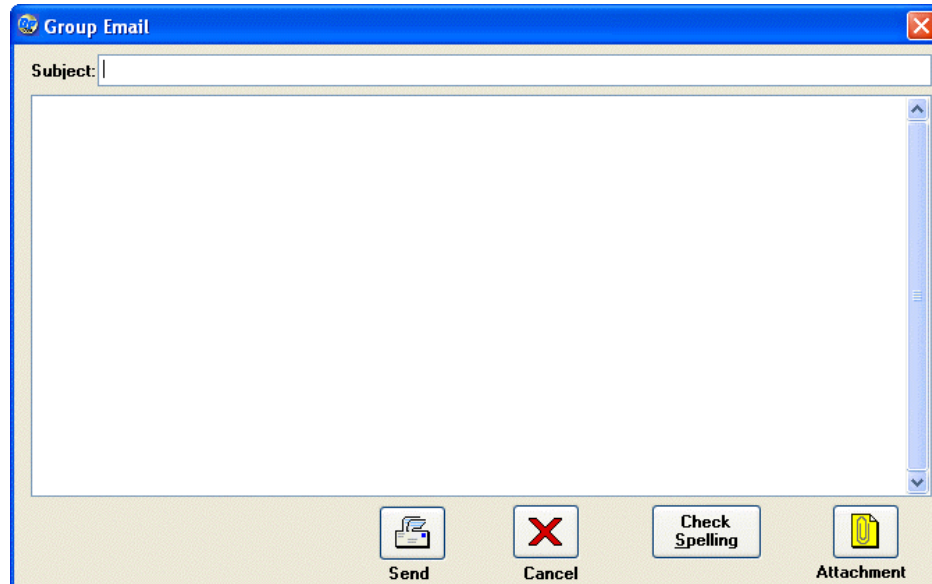
1. Click the **Mailings** button  and select **Group Email**.

The Listings and Mailings screen appears.

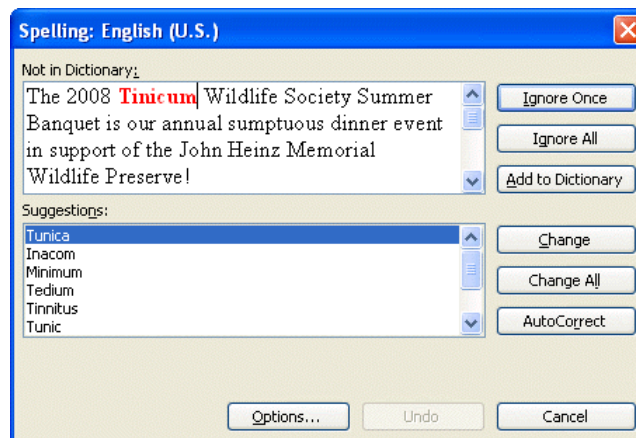


2. In Section **1**, select **Emails**.
3. In section **2**, select the options you want to use for the mailing (see “Mailing Options” on page 168 for full discussion of options):
  - a. To set a selection filter, select the **Set Selection Filter** check box. If you do not use a selection filter, your email will be sent to every donor in the system who has an email address listed. For more information on setting up selection filters, see “Working with Selection Filters,” page 118.
  - b. Check **Update Last Contact** to create a new contact record when each email is sent out. (see “Mailing Options” on page 168 for more information). This helps you track to which donors the email was sent, and is especially useful if a group email is disrupted before it is completed; in this situation, you can filter out the names that have already received the email.
4. Click **Do**. The **Group Email** screen appears.





5. Enter the subject line for the email into the **Subject** field.
6. Type or cut and paste the contents of the email into the large field underneath the **Subject** field. The contents of the email must be text only, no HTML or RTF formatting is allowed. The same email message will be sent out to all recipients of the email.
7. If desired, click **Attachment** to attach a file to the email message.
8. Click the **Check Spelling** button to check the spelling in your email message:



The spelling check uses the standard Microsoft spell check functionality.

Once you have finalized your email message, click the **Send** button to send the email, or the **Cancel** button to cancel out of sending the email.

## Producing Labels

You can run labels for any type of mailing you produce.

### ► To produce labels

1. On the main screen, click the **Mailings** button and select **Labels**. The Listings and Mailings screen appears.

2. In Section **1**, select **Labels**.
3. In section **2**, click the label format you want to use. The standard label formats are:

**Default Label:** Avery 5160 Three Up format

**Laser:** Avery 5161 Two Up format

**Bar code:** Barcode label

**Dot matrix #1:** 1 Across


**Dot matrix #2:** Cheshire

**User Defined:** User-Defined Label



**Note:** To change or add labels, or change the default label, see the section on “Defining Parameters for Mailings” in the *DonorPerfect Administrator’s Guide*.

4. In section **3**, select the options you want to use for the mailing (see “Creating Mail Merge Data Files” on page 158).

5. To preview labels prior to printing, click **Preview**. The **Print Preview** screen appears. To exit, click the  icon.
6. To print, click **Print**, choose the printer, and then click **OK**.

If you selected **Zip** as the Sort Order, the following message appears: **Do you want to print the zip counter/bulk mail reports now?** To confirm, click **Yes**.

Another message then appears: **Send report to printer?** Click **Yes** to confirm or **No** to display on screen. See the *DonorPerfect Reports* manual for a description of the Zip Code report.

## Mail Merge

### Overview

DonorPerfect gives you the ability to create communications for your donors through the use of mail merge data files. You have the ability to produce thank-you letters, pledge reminder letters, emails, and other types of communication you need.

### **Uses of Mail Merge Data Files**

You can use mail merge data files in many different ways. Here's a list of some of the communications you can produce through mail merge data files:

- personalized thank-you letters
- solicitations
- pledge reminders
- labels
- envelopes
- group emails

You can also use mail merge data files to take DonorPerfect data into another program for further analysis and manipulation. DonorPerfect's mail merge data files have certain fields included by default. See the following section for more information on each type of DonorPerfect mail merge file.

### **Types of Mail Merge Files**

DonorPerfect allows you to create several different types of mail merge files, which you can use to communicate with your donors. The type of communication you are sending determines what type of mail merge file you need to create. DonorPerfect can create four types of mail merge files:

Mail Merge File	Where Accessed in System	Uses
Regular Mail Merge	Mailings, Mailmerge	To produce any type of letter for donors with information from DonorPerfect.
Thank-you Letter File	Reports, Acknowledgment Processing	To produce thank-you letters for gifts that donors gave to your organization.
Pledge Reminder File	Mailings, Pledge Processing	To produce reminder letters for donors who owe you a payment on a pledge.
Insta-Merge	File, Add/Edit Records, Printer Icon	To produce a letter for a single donor in your system.

Each mail merge file starts with the same 13 fields, but depending on the file, other fields may be available. You also have the option to add fields to each mail merge file (for more information, see page 158). The following fields are available in each mail merge file:

1. donor id	5. title	9. city	13. ptitle
2. lname	6. salutation	10. state	
3. suff	7. second line	11. zip	
4. fname	8. address	12. phone	

Please note that the fields listed above are automatically created with the mail merge file and cannot be changed. For details on the regular, thank-you, and pledge reminder mail merge files, see the following sections.

### **Fields in Regular Mail Merge File**

The Regular Mail Merge File is called DONMRG.CSV or DONMRG.DBF, depending on the mail merge delimiter you've defined (see the *DonorPerfect Administrator's Guide*). The following fields are automatically included in this file:

1. donor id	5. title	9. city	13. ptitle
2. lname	6. salutation	10. state	
3. suff	7. second line	11. zip	
4. fname	8. address	12. phone	

For information on how to add fields to the regular mail merge file, see page 158.

### **Fields in Thank-you Letter File**

The Thank-you Letter File is called TY.CSV or TY.DBF, depending on the mail merge delimiter you've defined (see the *DonorPerfect Administrator's Guide*); you can have multiple thank-you letter files (TY01.CSV, TY02.CSV). The following fields are automatically included in the file:

1. donor id	7. second line	13. ptitle	19. gift lname
2. lname	8. address	14. gift amount	20. gift fname
3. suff	9. city	15. general ledger	21. fmv
4. fname	10. state	16. solicitation code	22. reference
5. title	11. zip	17. date	
6. salutation	12. phone	18. type of gift	

Please note that the fields listed above are automatically created with the mail merge file and cannot be changed. For information on how to add fields to the thank-you mail merge file, see page 158.

## Fields in Pledge Reminder File

The Pledge Reminder File is called DONPLG.CSV or DONPLG.DBF, depending on the mail merge delimiter you've defined (see the *DonorPerfect Administrator's Guide*). The following fields are automatically included in the file:

1. donor id	7. second line	13. ptitle	19. frequency
2. lname	8. address	14. bill amount	20. delinq. amt
3. suff	9. city	15. total amount	21. current due
4. fname	10. state	16. balance due	
5. title	11. zip	17. general ledger	
6. salutation	12. phone	18. solicitation	

Please note that the fields listed above are automatically created with the mail merge file and cannot be changed. For information on how to add fields to the pledge reminder mail merge file, see page 158.

## Creating Mail Merge Data Files

Before you create mail merge data files, close any mail merge documents you have open.



**Note:** If you need to send a file to a mail house, create the file by following this procedure. The addresses will be correct for organizations as well as individual donors, with the contact person's name preceding the organization name.

### ► To produce mail merge data files

1. From the main screen, click the **Mailings** button and select **Mailmerge**. The Listings and Mailings screen appears.

2. In Section **1**, select **Mailmerge**.
3. In section **2**, select the options you want to use for the mailing (see “Mailing Options” on page 168).
4. Click **Do**. A message appears telling you the name of the merge data file and asking if you want to give it another name.



**Note:** This message only appears if you selected the **Ask for Alternate Name for Merge File** check box in Mailings parameters. See “Setting Parameters for Mailings” in the *DonorPerfect Administrator’s Guide* for more information.

If you want to give the file a different name, click **Yes**; otherwise, click **No**. In the unusual case where the mail merge file has been set to be a FoxPro/dBase file, the default merge name is **donmrg.dbf**. A message appears showing you the number of records included in the file.

If you selected Zip as the Sort Order, the following message appears: Do you want to print the zip counter/bulk mail reports now? To confirm, click **Yes**. You’ll then be asked if you want to send the report to the printer. Click Yes to print it or No to display it onscreen. See the *DonorPerfect Reports* manual for a description of the Zip Code report.



**Note:** See page 158 for directions on setting up additional fields to be used in your mail merge. See page 160 for information about printing mail merges for your type of word processor.

## Editing the Fields in Mail Merge Files

You can edit the specific fields which appear in a mail merge data file. For details, see “Edit Mail Merge Fields” under “Defining Parameters” in the *DonorPerfect Administrator’s Guide*.


## Setting Up DonorPerfect to Work with Your Word Processor

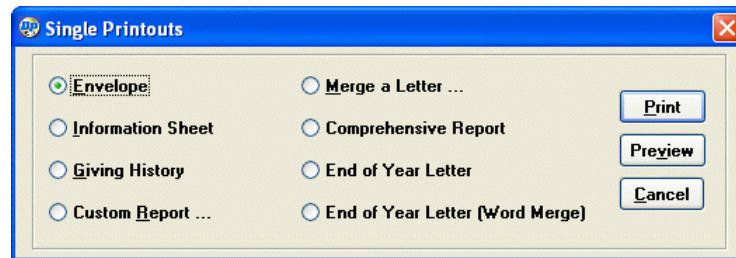
DonorPerfect’s default settings are compatible with Microsoft Word. No setup is required, unless you are using another word processor or want to change the default settings. If you are using passwords in DonorPerfect, see page 38 for details. If you aren’t using passwords, see “Setting Parameters for Mailings” in the *DonorPerfect Administrator’s Guide*. After you’ve set up DonorPerfect to work with your word processor, see page 160 for instructions on how to run mail merges.

## Creating a Single Mail Merge Letter with Insta-Merge

While in a donor's record, you can merge his or her name and address information into a single mail merge letter. This is a great way to run a mail merge for a single name or for a handful of names that aren't tied together by particular criteria. If you are on the Gift screen and there are gift fields in the merge data file format, it will include data from the current gift.

### ► To create a single mail merge letter with Insta-Merge

1. From the donor record for which you want to create a mail merge letter, click the **Printer** icon . The **Single Printouts** dialog box appears.



2. Select **Merge a Letter**.
3. To print the letter, click the **Print** button. To preview the letter, click the **Preview** button. The **Open** dialog box appears.
4. Click the mail merge document you want to use for the letter. In your DonorPerfect folder, you can find a document called **SINGLE.DOC**. Use this as a template for the mail merge document for Insta-Merge.
5. Click the **Open** button. The file opens in Word, and you are asked if you want to save changes.
6. Click **Cancel**, and then make any changes to the letter. The data file for a single mail merge is made up of the same field names as the Regular Mail Merge File (for details on which fields are included, see page 157).

## Running Mail Merges with DonorPerfect Merge Files

Once you've created the appropriate mail merge file in DonorPerfect, you need to use your word processor to create the mail merge letters you'll send to your donors. This section outlines some things to consider when using mail merge files with a word processor as well as instructions on creating mail merge letters in both Microsoft Word and WordPerfect.

### **Using DonorPerfect Mail Merge Fields with Your Word Processor**

The instructions included in this section detail the specific steps you should take to use mail merge files in your word processor; however, the following list outlines some points you should keep in mind when you use certain mail merge fields in your word processor.

- **Company/Organization Names.** If the Last Name field contains a company or organization name, and the record is set to be an organizational type of record, the contact person's name will automatically display in the *first name* merge field and the organization's name will display in the *second line* merge field.



- **Title Field.** The title field (the field that holds Mr./Ms.) automatically has a space after it. Therefore, do not place a space in your form letters between the *title* and *fname* fields. That way, if someone does not have a title (for instance, John and Martha Smith), a space will not print at merge time.
- **Salutation Field.** If the salutation field is left blank, it defaults to the Title+Lname as long as there is something in the title field. If there is nothing in the title field, it defaults to the first name field.
- **Current Due in Pledge Mailmerge.** The *current due* field in the Pledge Mail Merge File is the current amount due. If the pledge is due in the current month, this is the Bill amount or the pledge balance, whichever is less. If the pledge is not due this month (for example, it is an annual pledge to be billed every January and the current billing period is March), but it is being placed in the pledge reminder file because there is a delinquent amount, the current due is 0. To use the current amount due in a formula, the name of the memory variable is *mcurr*. Therefore, the formula *mcurr+dpgift.delinq* would show the current amount due plus the delinquent amount.

### **Running Mail Merges in Microsoft Word 97, 2000, 2002, and XP**

This section includes instructions on running mail merges in several different versions of Microsoft Word: 97, 2000, 2002, and XP. In order to run the mail merges, you'll need to create mail merge letters and then perform the actual mail merge in the version of Word you're running.

#### **Creating Mail Merge Letters**

Before you can actually use the mail merge data files you created in DonorPerfect, you need to create the mail merge letters you want to send to donors in Word.

To help you create the letters, the DonorPerfect system includes the following sample Microsoft Word letter, called WPTHANKS.DOC, which you can use as a basis for your mail merge letters. When you are creating a mail merge letter, we recommend always using this sample as a template, and copying it by clicking the File menu in Word and then choosing Save As.

```

{{TITLE}}{{FNAME}} {{LNAME}}
{{SECLN}}
{{ADD}}
{{CITY}}, {{ST}} {{ZIP}}

Dear {{SAL}},

Thanks for your donation of ${{AMT}}.

```

In addition to the WPTHANKS.DOC sample letter, DonorPerfect includes several other samples. The following table lists the names of all the sample letters as well as which DonorPerfect mail merge data files they should be used with. If you're using FoxPro data files with Word, the name of the FoxPro data file that the letter should be used with is included in the FoxPro File column.

Sample Letter File	Mail Merge File	FoxPro File
WPTHANKS.DOC (Thank-you Letter)	TY.CSV *	TY.DBF
WPLETTER.DOC (All-Purpose Letter)	DONMRG.CSV *	DONMRG.DBF
WPPLEDGE.DOC (Pledge Letter)	DONPLG.CSV *	DONPLG.DBF
*If you started using DonorPerfect before version 9, your mail merge files may have a DTA extension instead of a CSV extension. You can continue running your DTA files as usual; you do not have to switch to the CSV format.		

► **To set up your letters**

1. First, create a list of letter numbers and types of letters. For example:

Letter #	Type of Letter
01	Under \$50 gift
02	Over \$50 gift
03	Memorial
04	Capital Campaign

2. Create these letters by copying your original WPTHANKS letter. It is suggested that you name the files THANKS1, THANKS2, and so on, or use another convention that has the number in the name of the file. Remember to customize each thank-you letter for your donor audience.
3. As you enter each gift through the Gift entry screen, enter the number of the letter you want to use in the **Thank-you #** field. For example, enter 01 for gifts that will be sent thank-you letter 1, 02 for thank-you letter 2, and so on. When the system produces the thank-you letter files, the gifts that have 01 as the thank-you letter will be included in the TY01.CSV file, the gifts that have 02 as the thank-you letter will be included in the TY02.CSV file, and so on.
4. When you acknowledge gifts, be sure to create the thank-you merge file. See page 158 for more information.

When the mail merge files are created, you should use the thank-you file you created that corresponds to the appropriate DonorPerfect mail merge file. The following table shows how they might correspond:

Thank-You Letter File	Mail Merge File	FoxPro File
THANKS1.DOC	TY01.CSV	TY01.DBF
THANKS2.DOC	TY02.CSV	TY02.DBF
THANKS3.DOC	TY03.CSV	TY03.DBF

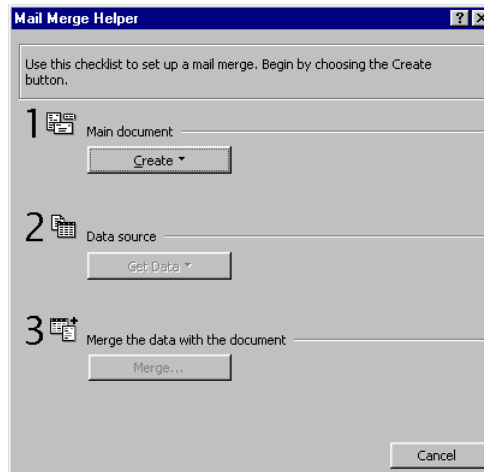
5. If you want to print envelopes or labels to all people who are to get thank-you letters, use the TY.CSV file. This file holds all names of people from all the TY?.CSV files.

### Microsoft Word 97 and 2000

The following instructions detail how to perform mail merges in Microsoft Word 97 and 2000 after you've created the mail merge file in DonorPerfect.

#### ► To run mail merges in Word 97 and 2000

1. Open Word for Windows.
2. Click the **Tools** menu, then **Mail Merge**. The **Mail Merge Helper** dialog box appears.



3. In **Section 1**, click the **Create** button.
4. From the pull-down that appears, click **Form Letters**. A dialog box appears.
5. Click **Active Window**.
6. In **Section 2** of the **Mail Merge Helper** dialog box, click the **Get Data** button.
7. From the pull-down that appears, click **Open Data Source**. The **Open Data Source** dialog box appears.
8. From the **Look In** pull-down, change the directory to find the folder where your mail merge directory is located. It is probably located in the **DPW32** folder, but you may have it in a different location.



**Note:** You can see which directory you use for mail merges by clicking on the **Help** menu, and then clicking **About DonorPerfect**. The **Mailmerge Directory** field shows the directory for mail merges.

9. From the **Files of type** pull-down, choose **All Files**.
10. Double-click on your data source file for the particular type of mail merge you are creating (regular, thank-you, or pledge). A message appears telling you that Word has found no merge fields in the document.
11. Click **Edit Main Document**.
12. On the toolbar, click the **Insert Merge Field** button.

- 13.** Using the list that appears based on the information in your mail merge file, insert the following fields to make the address block of your letter. Make sure to put spaces between the fields, with the exception of <<title>> and <<fname>>, which do not need spaces between them.

```
<<title>><<fname>> <lname> <suff>
<secln>
<add>
<city>, <st> <zip>
```



**Note:** If you use the template letters referenced in “Creating Mail Merge Letters” on page 161, much of this will already be done for you.

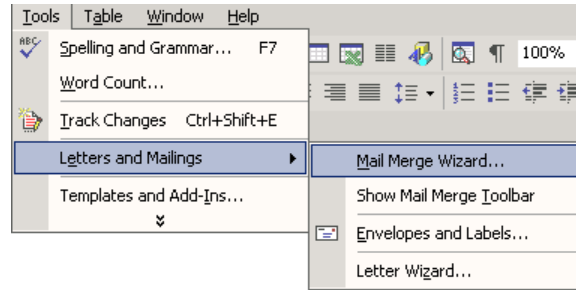
- 14.** To make the greeting, type the word **Dear**, then click on the **Insert Merge Field** button, choose <<sal>>, and type in your punctuation: **Dear <sal>**:
- 15.** Insert any additional fields into your document to customize your letter.
- 16.** Save the letter so that you can use it at a future time without having to go through all of the set up steps. Be sure to use a name that you will remember.
- 17.** Click the **Tools** menu, then **Mail Merge**. The **Mail Merge Helper** dialog box appears.
- 18.** In **Section 3**, click **Merge**. The **Merge** dialog box appears.
- 19.** From the **Merge to** pull-down, choose one of the following options:
- **New document**—merge to a new document
  - **Printer**—merge directly to a printer
- 20.** Once you have selected a method, click **Merge**. The merge is complete, and your letters are now either in a new document or printing.

### *Microsoft Word 2002 and XP*

The following instructions detail how to perform mail merges in Microsoft Word 2002 and XP after you’ve created the mail merge file in DonorPerfect.

► **To run mail merges in Word 2002 and XP**

- 1.** Open Word for Windows.
- 2.** In Microsoft Word, go to the **Tools** menu, click on **Letters and Mailings** and then **Mail Merge Wizard**.

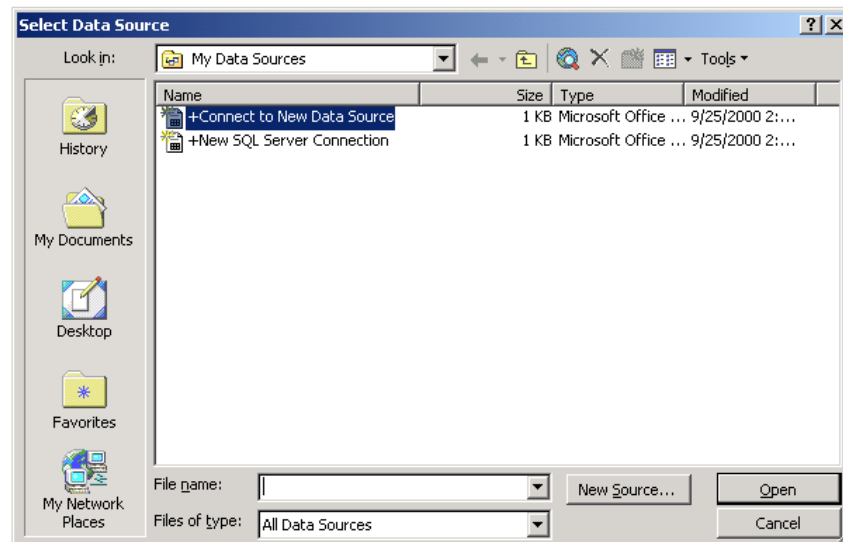


The **Mail Merge Wizard** appears in a pane on the right-hand side.

3. In the **Select document type** section, make sure **Letters** is selected.



4. At the bottom of the pane, click **Next**.
5. In the **Select starting document** section, you can use the document you have open when **Use current document** is selected.
6. Click **Next**.
7. In the **Use an existing list** section, click **Browse**. The **Select Data Source** dialog box appears. It defaults to a view of **My Data Sources**.

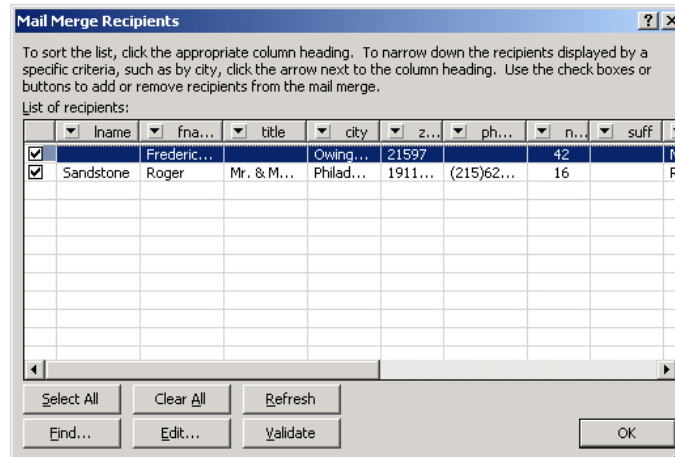


8. From the **Look in** pull-down, find the folder where your data file is located. It is probably located in the **DPW32** folder, but you may have it in a different location.



**Note:** You can see which directory you use for mail merges by clicking on the **Help** menu, and then clicking **About DonorPerfect**. The **Mailmerge Directory** field shows the directory for mail merges.

9. From the **Files of type** pull-down, choose **All Files**.
10. Double-click on your data source file for the particular type of mail merge you are creating (regular, thank-you, or pledge). The **Mail Merge Recipients** dialog box appears.



11. You can sort or deselect certain records if you wish. After you're finished reviewing the recipient list, click **OK**.
12. Click **Next**.
13. Start your letter by completing the following tasks:
14. Move the cursor to the location where you want to enter the recipient's address and insert the following fields to make the address block of your letter. Make sure to put spaces between the fields, with the exception of <<title>> and <<fname>>, which do not need spaces between them.

```

<<title>><<fname>> <<lname>> <<suff>>
<<secln>>
<<add>>
<<city>>, <<st>> <<zip>>

```

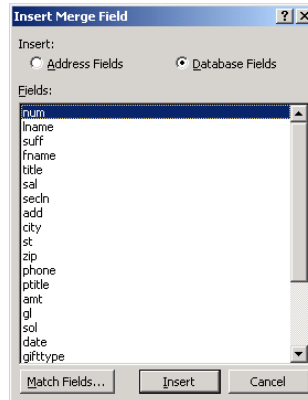


**Note:** If you use the template letters referenced in *Creating Mail Merge Letters* on page 161, much of this will already be done for you.



**Important!** Do **not** use the Wizard's *address block* or *match fields* features. Because DonorPerfect alters the data file to account for both individual and organizational records, inserting an address block or attempting to match fields may produce inaccurate addressing.

15. Move the cursor to the location where you want to place the greeting (or press **Enter** on your keyboard 2 times), and type the word **Dear** and insert a space.
16. In the **Write your letter** section, click **More Items**. The **Insert Merge Field** dialog box appears.

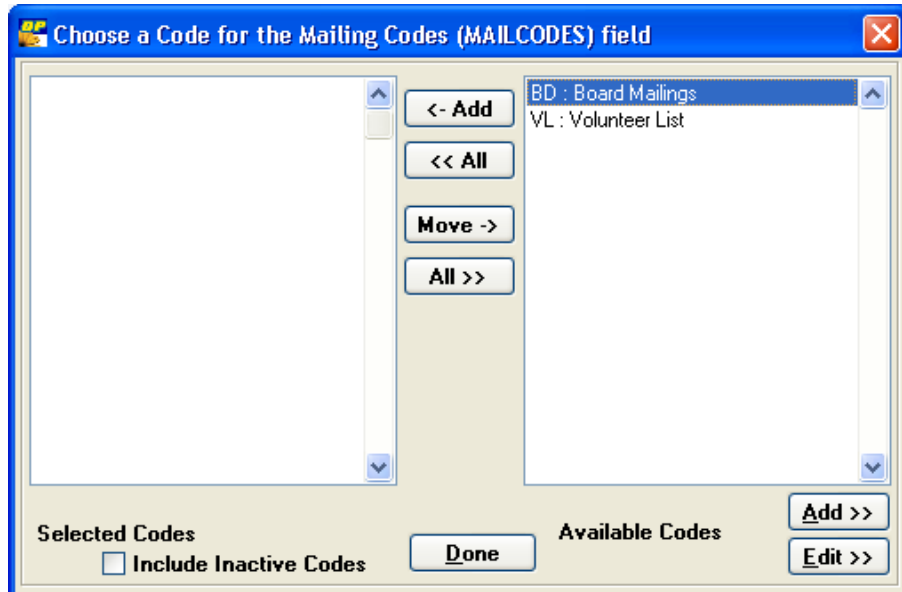


17. In the **Fields** section, click **sal**, then click **Insert** and then **Close**, or double-click on **sal** and then click **Close**.
18. After <<sal>> in the document, enter a comma or a colon to finish up the greeting.
19. Move the cursor to the location where you want to place the body of your letter and type the body. You should also save the document after you have inserted the fields, so that you can use it in the future. If you save the document at this point, you will not have to insert the merge fields the next time you open the document. This document will stay associated with the data file you selected in an earlier step of these procedures.
20. Click **Next**. A preview of your letters appears. If you are not happy with the way your letters are formatted or where the fields are placed, you can always go back a step by clicking **Previous** in the Mail Merge Wizard on the lower right-hand side.
21. Click **Next**: Preview your letters.
22. In the **Merge** section, click **Edit individual letters**. The **Merge to New Document** dialog box appears.
23. In the **Merge records** section, make sure **All** is selected or you can enter a range and print out a smaller portion of records if you have many letters to print.
24. Click **OK**. The merge is now complete.

## Mailing Options

The following table lists all of the options in the Set Report Options section of the Listings and Mailings screen. Which options you see depends on the type of mailing you select (Labels, Mailmerge, or Email).

Option	Description
<b>Set Selection Filter</b>	Allows you to establish criteria that must be met before a record is included in the procedure. If this check box is not selected, you will get all records in the database except the records that are checked "NO MAIL." Records that are checked "NO MAIL" will automatically be excluded unless you check "Include NO MAIL Names" (see below). See page 118 for detailed procedural information on setting selection filters.
<b>Include "NO MAIL" Names</b>	If you want to include those donors who have been marked as "Do Not Send Mail," select the <b>Include "NO MAIL" Names</b> check box.
<b>Include "NO EMAIL" Names</b>	The <b>Include "NO EMAIL" Names</b> check box is only available if you're running group emails. If you want to include those donors who have been marked as "Do Not Send EMail," select this check box.
<b>Choose Alternate Name/Address</b>	The <b>Choose Alternate Name/Address</b> check box allows you to send mail to addresses and/or names other than the primary address on the Main screen, based on what mail codes are associated with them. For example, you could use this feature to send board member mail only to board members, even if they are in the system with spouses or other organizations; you could do this by setting up an alternate name/address to be used with a mail code of BD (board member). If you select the <b>Choose Alternate Name/Address</b> check box, the <b>Choose a Code for the Mailing Codes (MAILCODES)</b> field screen appears. Choose the mail codes you want to include for labels from the <b>Available Codes</b> on the right. Those without the specified mailing code will receive it at their primary name/address.



**Note:** See page 70 for detailed procedural information on assigning mail codes to



Option	Description
	addresses.
<p><b>Suppress Professional Title</b></p>	<p>If you do not want the professional title to appear on labels, select the <b>Suppress Professional Title</b> check box.</p>
<p><b>Extra field or word to print on each label. Place field names in ( )'s</b></p>	<p>Enter a word or field you want to print at the top of each label if desired.</p> <p>Examples: If you enter <b>Happy Holidays!</b>, this phrase will appear at the top of each label. If you enter <b>GTOT</b> (the field that holds the donor's giving grand total), each record's grand total will print at the top. Enter the DonorPerfect function <b>getphone(1)</b> to print the primary phone number. For a list of the fields in the system, see the "DonorPerfect Tables and Field Descriptions" section of the <i>DonorPerfect Administrator's Guide</i>. For more information on DonorPerfect functions, see "DonorPerfect Functions" in the <i>DonorPerfect Administrator's Guide</i>.</p>
<p><b>Print in place of name</b></p>	<p>Enter a word or the value of a field you want to print in place of the name. For example, the formula "<b>The "+allt(dpadd.lname)+" Family"</b> will print <b>The Smith Family</b> for a record where the last name is Smith.</p>
<p><b>Sort Order</b></p>	<p>You can sort the mail merge files you create in any of the following orders:</p> <p><b>Alpha:</b> sorts selected records alphabetically by Last Name and then First Name. This is the default sort order.</p> <p><b>Zip:</b> sorts the selected records numerically by Zip Code and then alphabetically by name within each Zip Code. The system will always ask if you want a printout (the Zip Bulk Counter Report) when labels or mail merges are run with this sort order.</p> <p><b>Other:</b> allows a user to sort by other database fields. When you click this option, the <b>Field to Sort By</b> dialog box appears. Click the field you want to sort by, and then click <b>OK</b>.</p> <p><b>Random:</b> allows a random selection of names to be pulled from your system when running a mail merge. To run a listing or labels for a random sample, run the mail merge and tag the selected records with a Tag Date or contact information. Then run the list or labels by selecting the tagged records.</p>
<p><b>Update Last Contact</b></p>	<p>Displays the <b>Update Selected Records</b> screen, which allows you to update the following information for each record included in a mailing:</p> <div data-bbox="583 1440 1308 1684" data-label="Image"> </div> <p><b>Update Last Mail Code:</b> if this check box is selected, the records included will have the "Solicitations Sent" (MAILINGS) field updated with the mail code entered. (Normally this field is displayed on the Main Entry screen for the record.) In the example above, the SU07 (Summer 2007) mail code will be entered for each donor included in the mailing. If the code you enter doesn't exist, a message appears, asking if you want to add it to the code file. If you click Yes to add it, enter the</p>

Option	Description
	<p>code's description, and then click OK.</p> <p><b>Update Last Mailing Date:</b> If this check box is selected, the records included will have the "Last Mail Date" (LM_DT) field updated with the contact date entered. In the example above, "06/25/2007" will be entered for each donor included in the mailing.</p> <p><b>Update Contact Manager:</b> If this check box is selected, a record for each donor is created in the Contact Manager. The records selected will have a contact management transaction added and the "Mailing" (MAILING) field will be updated with the Mail Code entered. The Completed Date will be filled with the current date, unless you assign a due date to the record using the Show More Fields check box, described in the following paragraph. If the code you enter doesn't exist, a message appears, asking if you want to add it to the code file. If you click Yes to add it, enter the code's description, and then click OK.</p> <p>If you want to update additional fields on the <b>Contact Manager</b> screen, select the <b>Show More Fields</b> check box, which displays the <b>Contact Manager Default</b> screen. Enter the desired data to update each record.</p> <p><b>Note:</b> To see a list of field names and descriptions for the Contact Manager screen, see the "DonorPerfect Tables and Field Descriptions" section of the <i>DonorPerfect Administrator's Guide</i>.</p>
<b>Update Tag Date</b>	<p>A Tag Date is a date that you temporarily assign to a group of people in your database. The Tag Date is used as the first part of a two-pass selection filter. You can use a Tag Date in two situations: when you want to <b>exclude or include</b> a group of donors from a filter. In situations where the filter is too complex or you need to use both AND and OR among three or more files, use a two-pass selection filter with a Tag Date.</p> <p><b>Note:</b> See page 129 for detailed procedural information on running two-pass selection filters.</p>
<b>Tag Field</b>	<p>If you select the <b>Update Tag Date</b> check box, all records included in the procedure will have their "Tag Date" revised to reflect the date entered in the Tag field. The default tag date field is <b>tag_dt</b>, but you may change it to any date field that you have added from the Main (DP.DBF) table. In a multi-user environment, this will allow users to set up their own Tag Dates without overwriting what another user is doing. To do this, you must first add a date field to the structure of the Main (DP.DBF) table (see "Customizing Screens &amp; Tables" in the <i>DonorPerfect Administrator's Guide</i>).</p>

# 8. Processing Gifts & Pledges

## Overview

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After you enter the gifts and pledges that your organization has received from donors, you need to review and process them in your system. Typically, you'll acknowledge gifts and process pledges on a regular basis that fits in with the needs and requirements of your organization.

This chapter leads you through how to acknowledge gifts and process pledges in the following sections:

- “Acknowledging Gifts” on page 171
- “Creating Pledge Reminders” on page 189

## Acknowledging Gifts

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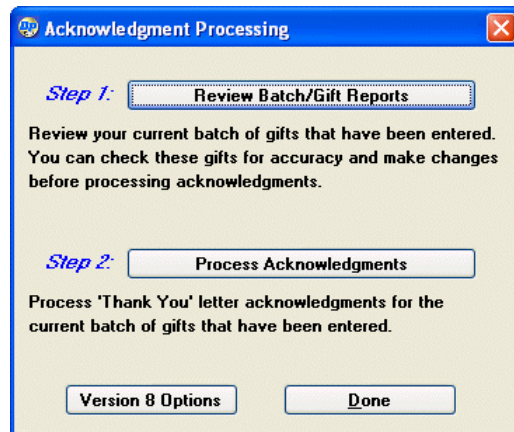
- “Reviewing Gift Entries” on page 171 tells you how to review the gifts that have been entered into the system to make sure they are correct. You should review gift entries every time you want to print thank-you letters.
- “Creating Thank-You Letters” on page 178 explains how to create thank-you letters from within DonorPerfect, without first opening your word processor. You can create thank-you letters anytime, but it's a good idea to review your gift entries for accuracy first.
- “Version 8 Options” on page 182 describes methods for acknowledging gifts that were used in version 8 of DonorPerfect. Prior to DonorPerfect version 9, these were the only methods available. (Acknowledgment Processing was called “Batch Processing” in the earlier versions). These methods are being included for users who are familiar with them, and would like to continue using them until they have a chance to try the newer methods.

## Reviewing Gift Entries

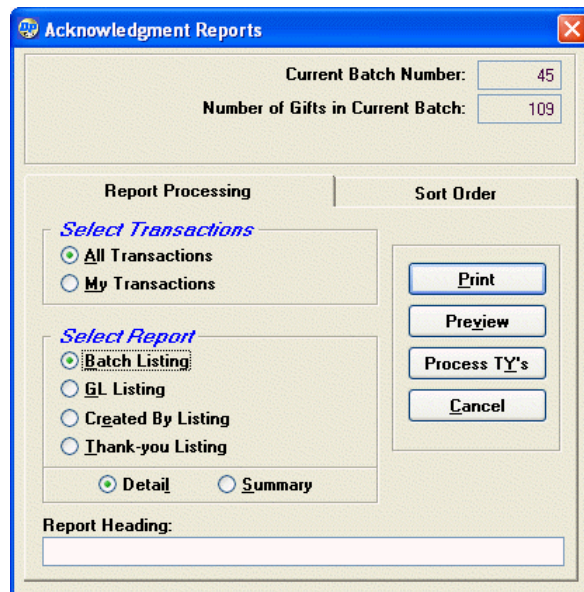
Before you create thank-you letters, you should to review your current batch of gifts.

### ► To review gifts

1. From the main screen, click the **Acknowledgments** button. The Acknowledgment Processing screen appears.



- Click the **Review Batch/Gift Reports** button.  
The Acknowledgment Reports screen appears.



- 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 only the gifts and pledges that you entered into DonorPerfect since acknowledgments were last processed.
- In the **Select Report** section, choose the report you want to run for the current batch:
  - Batch Listing:** lists gifts entered in the order they were entered (for sample reports, see page 174).
  - GL Listing:** lists gifts entered, totaled by account or fund to which they are being credited (for sample reports, see page 175).

- **Created By Listing:** lists gifts entered, by user ID of person who entered them (for sample reports, see page 176).
  - **Thank-you Listing:** lists gifts entered, by type of thank-you letter to be sent (e.g., Standard Thank You, Capital Campaign (for sample reports, see page 176).
5. Select either **Detail** to show detailed information for each gift and pledge or **Summary** to show subtotals for all gifts and pledges.
  6. In the **Report Heading** field, type a heading for your report, if you wish.
  7. To create the listing, either click **Preview** (to view it on-screen) or **Print** (to print it).
  8. Check the listing to make sure the correct thank-you letter number is assigned to each gift.



**Note:** If you find errors, correct them by clicking on any gift, or correct them in the Batch Browser when you create your thank-you letters (step 3 on page 178).

### Batch Listing

The Batch Listing Report lists the gifts entered into the system since the last time acknowledgments were processed. You can view this report in either a detail or summary version.

#### Detail Version

07/27/2007		Your Organization Name Here Batch Listing for Current Batch						Page: 1			
Donor	Name	Date	Amount	Pledged	Soft Credit	G/L	Type	SOL	Type	Letter	Reference
19	Mr. Jack Dunn	06/20/2005	400.00	0.00		UN	Gift	BG07	CK	01	Check #2001
17	Mr. Red Grant	07/27/2007	400.00	0.00		UN	Gift	BG07	CK	01	Check #263
15	Mr. & Mrs. Edward Hobart	06/25/2007	300.00	0.00		BF	Gift	PH07	CA	05	
18	Mr. Jon Rausch	07/27/2007	25.00	0.00		UN	Gift	BG07	CK	01	Check #902
16	Elizabeth Reynolds, MD	07/23/2007	250.00	0.00		UN	Gift	BG07	CK	01	Check #937
16	Elizabeth Reynolds, MD	08/01/2007	50.00	0.00		BF	Gift	PH07	CK	01	Check #959

Detail by Gift Type			Grand Totals			
Cash	1	300.00	Count:	6	0	0
Check	5	1,125.00	Total:	1,425.00	0.00	0.00
American	0	0.00	Current batch: 3			
Visa	0	0.00				
MasterCard	0	0.00				
Insta-Charge	0	0.00				
Discover	0	0.00				
Other	0	0.00				
<b>TOTAL</b>	<b>6</b>	<b>1,425.00</b>				

#### Summary Version

07/27/2007		Your Organization Name Here Batch Listing for Current Batch						Page: 1			
Donor	Name	Date	Amount	Pledged	Soft Credit	G/L	Type	SOL	Type	Letter	Reference
Detail by Gift Type			Grand Totals								
Cash	1	300.00	Count:	6	0	0					
Check	5	1,125.00	Total:	1,425.00	0.00	0.00					
American	0	0.00	Current batch: 3								
Visa	0	0.00									
MasterCard	0	0.00									
Insta-Charge	0	0.00									
Discover	0	0.00									
Other	0	0.00									
<b>TOTAL</b>	<b>6</b>	<b>1,425.00</b>									

### GL Listing

The GL Listing provides a listing by General Ledger of gifts entered into the system since the last time acknowledgments were processed. If you use the optional Accounting Module, it also has a line for Accounting Code. You can view this report in either a detail or summary version.

#### Detail Version

07/27/2007		Your Organization Name Here GL Batch Listing for Current Batch				Page: 1
ID	Name	Type	Date	Solicitation	Amount	Reference
<b>BF - Building Fund</b>						
16	Elizabeth Reynolds, MD	CK	08/01/2007	PH07	50.00	Check #959
15	Mr. & Mrs. Edward Hobart	CA	06/25/2007	PH07	300.00	
				<b>BF - Building Fund</b>	<b>2</b>	<b>350.00</b>
<b>UN - Unrestricted</b>						
16	Elizabeth Reynolds, MD	CK	07/23/2007	BQ07	250.00	Check #937
17	Mr. Red Grant	CK	07/27/2007	BQ07	400.00	Check #263
18	Mr. Jon Rausch	CK	07/27/2007	BQ07	25.00	Check #902
19	Mr. Jack Dunn	CK	06/20/2005	BQ07	400.00	Check #2001
				<b>UN - Unrestricted</b>	<b>4</b>	<b>1,075.00</b>
					<b>6</b>	<b>1,425.00</b>

Cash	1	300.00
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
<b>TOTAL</b>	<b>6</b>	<b>1,425.00</b>

Current batch: 3

#### Summary Version

07/27/2007		Your Organization Name Here GL Batch Listing for Current Batch		Page: 1
			Amount	
<b>BF - Building Fund</b>			<b>2</b>	<b>350.00</b>
<b>UN - Unrestricted</b>			<b>4</b>	<b>1,075.00</b>
			<b>6</b>	<b>1,425.00</b>

Cash	1	300.00
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
<b>TOTAL</b>	<b>6</b>	<b>1,425.00</b>

Current batch: 3

### Created By Listing

The Created By Listing shows gifts entered, by user ID of person who entered them, since the last time acknowledgments were processed.

#### Detail Version

Your Organization Name Here										
Created By Batch Listing for Current Batch										
Gift ID #	Amt	Soft Credit Amt	Pledge Total	Name	Date	GI	Sol	Type	TY #	Ref
Transactions entered by LW										
10	250.00	0.00	0.00	Elizabeth Reynolds, MD	07/23/2007	UN	BQ07	CK	01	Check #937
11	50.00	0.00	0.00	Elizabeth Reynolds, MD	08/01/2007	BF	PH07	CK	01	Check #959
12	400.00	0.00	0.00	Mr. Red Grant	07/27/2007	UN	BQ07	CK	01	Check #263
13	25.00	0.00	0.00	Mr. Jon Rausch	07/27/2007	UN	BQ07	CK	01	Check #902
14	400.00	0.00	0.00	Mr. Jack Dunn	06/20/2005	UN	BQ07	CK	01	Check #2001
15	300.00	0.00	0.00	Mr. & Mrs. Edward Hobart	06/25/2007	BF	PH07	CA	05	
6	1,425.00	0.00	0.00	Totals for LW						
<b>Total:</b>	1,425.00	0.00	0.00							
<b>Count:</b>	6									

#### Summary Version

Your Organization Name Here										
Created By Batch Listing for Current Batch										
Gift ID #	Amt	Soft Credit Amt	Pledge Total	Name	Date	GI	Sol	Type	TY #	Ref
Transactions entered by LW										
6	1,425.00	0.00	0.00	Totals for LW						
<b>Total:</b>	1,425.00	0.00	0.00							
<b>Count:</b>	6									



**Thank-You Listing**

The Thank-You Listing shows how many of each thank-you letter (for example, Standard Thank You, Capital Campaign) will be produced for this batch.

**Detail Version**

07/27/2007		Your Organization Name Here				1
		Thank-you Listing for Current Batch				
ID	Name	Type	Date	Solicitation	Amount	
<b>01 - Standard Thank You</b>						
16	Elizabeth Reynolds, MD	CK	07/23/2007	BQ07	250.00	
16	Elizabeth Reynolds, MD	CK	08/01/2007	PH07	50.00	
17	Mr. Red Grant	CK	07/27/2007	BQ07	400.00	
18	Mr. Jon Rausch	CK	07/27/2007	BQ07	25.00	
19	Mr. Jack Dunn	CK	06/20/2005	BQ07	400.00	
01 - Standard Thank You				5	1,125.00	
<b>05 - Gifts Over \$250</b>						
15	Mr. & Mrs. Edward Hobart	CA	06/25/2007	PH07	300.00	
05 - Gifts Over \$250				1	300.00	
				<b>6</b>	<b>1,425.00</b>	

**Summary Version**

07/27/2007		Your Organization Name Here		1
		Thank-you Listing for Current Batch		
Letter	Count	Total		
<b>01 - Standard Thank You</b>		5	1,125.00	
<b>05 - Gifts Over \$250</b>		1	300.00	
		<b>6</b>	<b>1,425.00</b>	

## Creating Thank-You Letters

This section explains how to create your thank-you letters from within DonorPerfect.



**Important!** Close any open merge documents before you create thank-you letters, or you may encounter file sharing errors as the system creates the merge dat files.

### ► To create thank-you letters

1. Do one of the following:

- From the **Acknowledgment Reports** screen (see page 171), click the **Process TY's** button.

-OR-

- From the **Acknowledgment Processing** screen (see page 171), click the **Process Acknowledgments** button.

The Acknowledgment Processing screen appears.

Select	Thank You Letter	Description	Pending Thank You's	Pending Gift Amount	Pending Pledge Amount
<input type="checkbox"/>		** No Letter Assigned **	79	\$88,650.00	\$2,335.00
<input checked="" type="checkbox"/>	01	Standard Thank You	7	\$1,570.00	\$0.00
<input checked="" type="checkbox"/>	03	Capital Campaign Thank You	2	\$0.00	\$3,000.00
<input checked="" type="checkbox"/>	04	Major Donor Thank You	2	\$575.00	\$0.00
<input checked="" type="checkbox"/>	23	Summer Special Mailing	9	\$3,975.00	\$0.00
<input checked="" type="checkbox"/>	46	Soft Credit Thank You	3	\$1,100.00	\$0.00
<input checked="" type="checkbox"/>	99	No TY Letter (to send)	7	\$651.98	\$2,525.00

Process Selected

**Process Total**  
 Pending Thank You's **109**  
 Pending Gift Amount **\$96,521.98**  
 Pending Pledge Amount **\$7,860.00**

Batch Update

Cancel

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. If you also want to create thank-you letters for gifts and pledges that were previously processed, set a selection filter to narrow the selection of gift entries, or browse a batch to edit your gift entries, click the **Advanced** button. See page 181 for more information.

- Check the **Select** check box to the left of each **Thank You Letter** type you want to create. (Checking the box immediately below the **Select** column heading checks all of the boxes.)



**Note:** If you select a blue, underlined hyperlink, you can view more detail.

- Click the **Process Selected** button.

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

Select	First Name	Last Name	Gift Amount	Pledge Amount	Date	GL	SOL	Thank You Letter
<input checked="" type="checkbox"/>	Brian	Mann	\$500.00	\$0.00	07/10/2007	UN		46
<input checked="" type="checkbox"/>	William	Seitz	\$500.00	\$0.00	07/10/2007	UN		46
<input checked="" type="checkbox"/>	Richard	Wentworth	\$100.00	\$0.00	08/01/2008	UN	SCRE	46
<input checked="" type="checkbox"/>	Jack	Daniels	\$25.99	\$0.00	07/15/2008	JL	C'08	99
<input checked="" type="checkbox"/>	Jack	Daniels	\$25.99	\$0.00	07/15/2008	JL	C'08	99
<input checked="" type="checkbox"/>	William H	Gates	\$0.00	\$25.00	07/22/2008		WT08	99
<input checked="" type="checkbox"/>	Roger	Sandstone	\$100.00	\$0.00	07/31/2008	UN	UNSO	99
<input checked="" type="checkbox"/>	Clark	Savage	\$0.00	\$500.00	07/18/2008	BF	UNSO	99

*Transaction Order*

Default  
 Alpha  
 Zip  
 Date  
 Amount  
 Other ...

Ascending  
 Descending

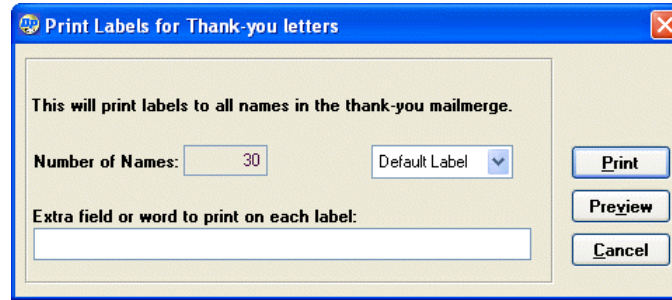
Count: 30  
 Gift Total: \$7,871.98  
 Pledge Total: \$5,525.00

Merge in Separate Letters  
 Merge in One Letter  
 Create Merge Files  
 Print Labels

- Select one of the following:
  - Merge in Separate Letters:** to create a separate mail merge data file for each letter, plus a file that contains the data for all the letters being merged. This option only works with Microsoft Word.
  - Merge in One Letter:** to create a single mail merge data file for all of the letters. Use this option if your document contains conditional statements that make multiple letters unnecessary. This option only works with Microsoft Word.
  - 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.
- If you also want to print labels, select **Print Labels**.
- Click Merge Selected.
- If you chose **Merge in Separate Letters** or **Merge in One Letter**, the **Select Thank You Letter** dialog box appears. Double-click the thank-you letter you want

to merge your data into. The merged thank-you letters appear in your word processor. Print the letters, save the file if you wish, and then close it.

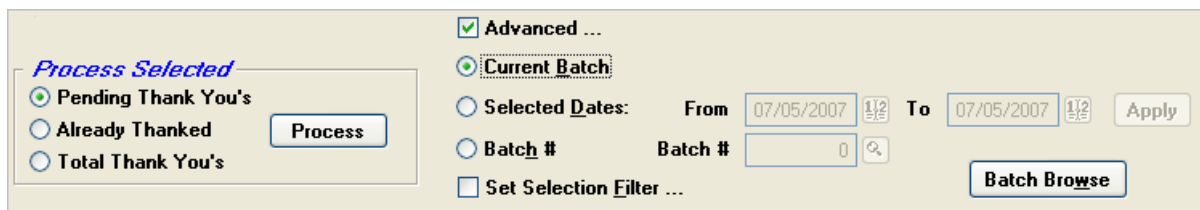
10. A message appears telling you how many names were placed in the thank-you mail merge file. Click **OK** to close the message.
11. If you selected to **Print Labels**, the **Print Labels for Thank-you letters** dialog box appears. In the pull-down, select the label format you want to use. You may enter an **Extra field or word to print on each label**, if you wish. Click **Print** to print the labels or **Preview** to preview them.



12. When you are finished with your letters and labels, you are returned to the **Acknowledgment Processing** screen. Note that the processed thank-yous have been removed. They are also assigned a batch number. To exit, click **Cancel**, and then **Done**.

### Advanced Thank-You Options


When you select the **Advanced** button on the **Acknowledgment Processing** screen (see page ), the following advanced options appear. The advanced options enable you to refine your selection of transactions to be processed or to correct gift entries before you begin processing.



#### ► To complete the advanced thank-you options

1. Select the category of gifts you want to process:
  - **Pending Thank You's** (the current batch): gifts that have been entered into DonorPerfect since acknowledgments were last processed. This is the default.
  - **Already Thanked**: gifts for which thank-you letters were previously created.
  - **Total Thank You's**: gifts that have been entered since acknowledgments were last processed, *and* pledges for which thank-you letters were previously created.
2. Select one of the following to specify which gifts and pledges to process:
  - **Current Batch**: all gifts received since the last batch update. (This is the default.)

- **Selected Dates:** gifts received on or between the dates you enter in the **From** and **To** fields.
  - **Batch #:** gifts in a specific batch, which you enter in the **Batch #** field.
  - **Set Selection Filter:** select this check box to specify which gifts you want to see. Then choose a filter and then click **OK**. A selection filter allows you to establish criteria so that only gifts matching the criteria will be processed. For example, you may want a listing of just the gifts for a certain General Ledger or Solicitation Code. For more information about selection filters, see page 118.
3. Click the **Apply** button. The gifts you selected are listed at the bottom of the screen.
  4. If you want to view or edit the selected gifts, click **Batch Browse**, make any necessary changes in the **Batch Browser** screen that appears, and then select **File**, then **File Close**.



**Warning!** Changes you make in the Batch Browser list will permanently change your gift data.

Batch Browser								
	Fname	Lname	Date	Amt	GI	Sol	Tyletter	Ref
▶	Jim	Barkley	05/29/2007	250.00	UN	SCRE	46	
	Kevin	Bacon	05/29/2007	250.00	UN	SCRE	46	
	Jake	Beausay	05/29/2007	250.00	UN	SCRE	46	
	Dave	Cramer	05/29/2007	250.00	UN	SCRE	46	
	The	Shell Oil Company	05/17/2007	0.00	UN	SCRE	46	
	Kevin	Bacon	06/29/2007	50.00	UN	PH07	01	583
	Dave	Cramer	06/15/2007	75.00	UN	PH07	01	1066
	Roger	Sandstone	06/25/2007	100.00	UN	PH07	01	207
	Elizabeth	Reynolds	06/18/2007	200.00	UN	PH07	01	872

## Version 8 Options

This section describes acknowledging processing (also called “Batch Processing”) methods used in version 8 of DonorPerfect. These methods are included for users who are familiar with them, and would like to continue using them until they are familiar with the newer methods described in the previous sections.

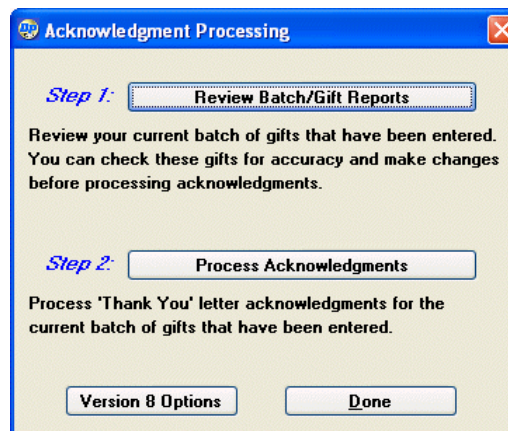
### **Reviewing and Processing Gifts**

This section explains how to select gift entries and output options (labels, thank-you letter merge file) for Acknowledgment Processing. It also tells you how to review the selected gift entries in a report and create your mail merge data files.

► **To select gift entries and output options**

1. From the main screen, click the **Acknowledgments** button .

The Acknowledgment Processing screen appears.



2. Click Version 8 Options.

A second **Acknowledgment Processing** screen appears.

3. Select the transactions you want to process:
  - **All Transactions:** all gifts entered into DonorPerfect since acknowledgments were last processed.
  - **My Transactions:** just the gifts **you** entered into DonorPerfect since acknowledgments were last processed.
4. Choose the report you want to use to review your gift entries:
  - **Batch Listing:** lists gifts entered since the last time acknowledgments were processed (for sample reports, see page 174).
  - **GL Listing:** lists gifts entered, by account or fund to which they are being credited, since the last time acknowledgments were processed (for sample reports, see page 175).
  - **Created By Listing:** lists gifts entered, by user ID of person who entered them, since the last time acknowledgments were processed (for sample reports, see page 176).
  - **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 (for sample reports, see page 176).

5. Define what type of report you want to run:
  - **Detail:** shows detail for each gift.
  - **Summary:** shows only subtotals for all gifts.
6. If you want the system to automatically create a thank-you mail merge file, select the **Create Thank-you File** check box; this may be checked by default, depending on how your system is set up.



**Note:** Before you create the thank-you file, you should preview the gifts in a report. This allows you to ensure that the correct thank-you number has been assigned for each gift.

7. If you want the system to print labels for the thank-you letters, select the **Print Thank-you Labels** check box. In order to select this option, you must also select the **Create Thank-you File** check box.
8. In the **Report Heading** field, enter the heading you want to print on the report if desired.
9. If you want to define a filter or sort order for the transactions, click the **Filter and Sort** tab and complete the following options. Typically, you'll use these options to review historical batches of gifts. From here, you may select from all gifts and pledges in your system.

Transaction Filter

- **Current Batch:** all gifts received since the last batch update. (This is the default.)



- **Selected Dates:** gifts received on or between the dates you enter in the **From** and **To** fields.
- **Batch #:** gifts in a specific batch, which you enter in the **Batch #** field.
- **Set Selection Filter:** when selected, displays a dialog box where you can choose a selection filter. A selection filter allows you to establish criteria so that only gifts matching the criteria will be processed. For example, you may want a listing of just the gifts for a certain General Ledger or Solicitation Code. For more information about selection filters, see 118.

#### Transaction Order

- **Default:** sorts information in order of gift entry.
- **Alpha:** sorts information alphabetically by Last Name and then First Name.
- **Zip:** sorts numerically by Zip Code and then alphabetically by name within each Zip Code.
- **Date:** sorts information by the Date field.
- **Amount:** sorts information by the amount donated.
- **Other:** allows a user to sort by other fields. When you click this option, the **Field to Sort By** dialog box appears. Click the field you want to sort by, and then click **OK**.
- **Ascending:** orders the information oldest to newest, smallest to largest, or A - Z.
- **Descending:** orders the information newest to oldest, largest to smallest, or Z - A.

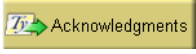
#### ► To review gift entries and create your output

1. Click the **Batch Processing** tab on the **Acknowledgment Processing** screen (**Error! Reference source not found.** on page **Error! Bookmark not defined.**).
2. To review your gift entry report on the screen, click **Preview**. To print it, click **Print**, choose the printer, and then click **OK**. If you chose to create a thank-you mail merge file, a message appears telling you how many names were placed in the file.
3. Click **OK** to close the thank-you letter message. If you chose to print thank-you labels, the **Print Labels for Thank-you Letters** dialog box appears.
4. From the label pull-down, choose the label you want to use to print the labels.
5. In the **Extra field or word to print on each label** field, you may enter the extra information you want to print on the label if desired. For example, if it's the holiday season, you can enter Happy Holidays.

### ***Editing Gift Entries in the Batch Browser***

You can make corrections to a batch of gift entries in the **Batch Browser** screen. This is very useful when the report you run shows some gifts or names that need to be modified.

► **To edit gift entries in the Batch Browser**

1. Click the **Acknowledgments** button . The **Acknowledgment Processing** screen appears (**Error! Reference source not found.** on page **Error! Bookmark not defined.**).
2. Click **Version 8 Options**. A second **Acknowledgment Processing** screen appears (**Error! Reference source not found.** on page **Error! Bookmark not defined.**).
3. Select the transactions you want to process:
  - **All Transactions:** all gifts entered into DonorPerfect since acknowledgments were last processed.
  - **My Transactions:** just the gifts **you** entered into DonorPerfect since acknowledgments were last processed.
4. If you want to define a filter or sort order for the transactions, click the **Filter and Sort** tab and complete the following options. Typically, you'll use these options to review historical batches of gifts. From here, you can select from all gifts in your system and define any sort order.

Transaction Filter

- **Current Batch:** all gifts received since the last batch update. (This is the default.)
- **Selected Dates:** gifts received on or between the dates you enter in the **From** and **To** fields.
- **Batch #:** gifts in a specific batch, which you enter in the **Batch #** field.
- **Set Selection Filter:** when selected, displays a dialog box where you can choose a selection filter. A selection filter allows you to establish criteria so that only gifts matching the criteria will be processed. For example, you may want a listing of just the gifts for a certain General Ledger or Solicitation Code. For more information about selection filters, see 118.


Transaction Order

- **Default:** sorts information in gift entry order.
- **Alpha:** sorts information alphabetically by Last Name and then First Name.
- **Zip:** sorts numerically by Zip Code and then alphabetically by name within each Zip Code.
- **Date:** sorts information by date of gift.
- **Amount:** sorts information by the amount donated.
- **Other:** allows a user to sort by other fields. When you click this option, the **Field to Sort By** dialog box appears. Click the field you want to sort by, and then click **OK**.
- **Ascending:** orders the information oldest to newest, smallest to largest, or A - Z.

- **Descending:** orders the information newest to oldest, largest to smallest, or Z - A.
5. To edit the selected gifts in a grid view, click the **Browse** button on the **Batch Processing** tab. The following message appears:  
Warning! Changes made in browse will permanently change the gift data.
  6. Click **OK** to close the message and open the **Batch Browser** screen.

Batch Browser								
	Fname	Lname	Date	Amt	GI	Sol	Tyletter	Ref
▶	Jim	Barkley	05/29/2007	250.00	UN	SCRE	46	
	Kevin	Bacon	05/29/2007	250.00	UN	SCRE	46	
	Jake	Beausay	05/29/2007	250.00	UN	SCRE	46	
	Dave	Cramer	05/29/2007	250.00	UN	SCRE	46	
	The	Shell Oil Company	05/17/2007	0.00	UN	SCRE	46	
	Kevin	Bacon	06/29/2007	50.00	UN	PH07	01	583
	Dave	Cramer	06/15/2007	75.00	UN	PH07	01	1066
	Roger	Sandstone	06/25/2007	100.00	UN	PH07	01	207
	Elizabeth	Reynolds	06/18/2007	200.00	UN	PH07	01	872

7. Make any necessary changes to the gift entries.




**Warning!** Changes you make in the Batch Browser list will permanently change your gift data, not just for the current report or merge file.

8. From the **File** menu, click **File Close**. Your changes to the batch are saved.

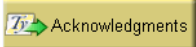
### Updating the Batch

When you are finished processing a batch, you should update it. This assigns a unique number to the batch and marks it as processed, ensuring that the gifts in the batch are not accidentally processed again.



**Important!** If you don't update the batch after creating a thank-you merge file, the gift entries will be reprocessed the next time you perform Acknowledgment Processing, and you could accidentally send duplicate thank-you letters.

▶ **To update the gift batch**

1. Click the **Acknowledgments** button . The **Acknowledgment Processing** screen appears (**Error! Reference source not found. on page Error! Bookmark not defined.**).
2. Click **Version 8 Options**. A second **Acknowledgment Processing** screen appears (**Error! Reference source not found. on page Error! Bookmark not defined.**).
3. Click **Batch Update**. The following System Message appears:

This will update the batch record counter for all gifts in the current batch. You should run a batch listing and create thank-you files before running this procedure. Continue?

4. Click **Yes** to proceed with the batch update.

## Creating Pledge Reminders

To process, you need to set pledge parameters, run monthly pledge reminders, and review pledge reports.



**Important!** Close any open merge documents before you create pledge reminders, or you may encounter errors.



**Note:** SofterWare offers a Pre-Authorized Payments/EZ-EFT Module to process payments; see page 272 for more information.

## Setting Pledge Parameters

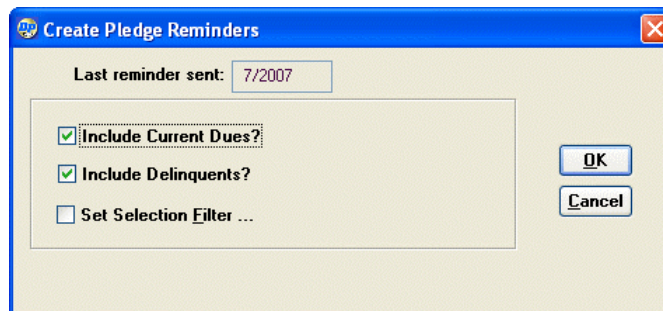
DonorPerfect allows you to set parameters for how you will handle pledges in your system. You can set the parameters to define whether or not to do the following:

- Include pledges in financial reports
- Delete old pledge balances
- Allow negative pledge balances
- Show pledges on the History List

For detailed instructions on how to set up pledge parameters, see the section on “Setting Pledge Parameters” in the *DonorPerfect Administrator’s Guide*.

## Running Monthly Pledge Reminders

Pledges should be processed on a monthly basis. DonorPerfect automatically designates the current billing cycle as the month following the date of the last billing. A billing is defined as when pledge reminders are created and the “Include Current Dues?” check box has been selected. For example, if the last billing was run for May, DonorPerfect will automatically designate June as the current billing cycle. However, this period can be easily adjusted through pledge parameters or at run time. For more information, see “Setting Pledge Parameters” in the *DonorPerfect Administrator’s Guide*.



► **To create pledge reminders**

1. From the main screen, click the **Mailings** button and select **Pledge Processing**. The **Create Pledge Reminders** screen (see page **Error! Bookmark not defined.**) appears. The screen indicates when the last reminder was sent.
2. To include donors who have a payment due this cycle, select the **Include Current Dues** checkbox. This will include:
  - Pledges due twice each month
  - Pledges due every other month
  - Monthly pledges
  - Quarterly pledges due for that quarter
  - Semi-annual pledges due for that half-year period
  - Annual pledges whose start date is in the month
  - Unusual payment schedule pledges with payments due that month.



**Note:** Pledge reminders for **Include Current Dues** must be run every month to update the delinquent amount field.

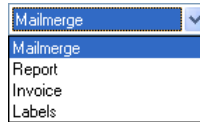
3. If you want to include records of donors who have been previously billed but have not yet paid, select the **Include Delinquents** check box.
4. To set a selection filter, select the **Set Selection Filter** check box. Define the filter, and click **OK** at the Selection Verification Screen. For more information on setting up selection filters, see page 118.
5. Click **OK**. The **Pledge Reminder Options** screen appears.

6. In the **Reminders run for pledges due** field, enter the month and year of the desired billing period. DonorPerfect will automatically enter the month following the last time reminders were sent.
7. Select the **Update delinquent amounts** check box.

**Important!**

**DELINQUENT AMOUNTS MUST BE UPDATED ONCE A MONTH.** The Bill amount of each pledge is added to its Delinquent field each time pledge reminders are run. This is offset by subtracting the amount of any payment as it is applied. Thus, the Delinquent field reflects the amount that has been billed but not received. “Early Payers” are those with a negative delinquent amount. For more information about delinquent amounts, see the following sections.

8. To send reminders to donors who have already paid for the month, select the **Include early payers** check box.
9. From the **Mailmerge** pull-down, choose the type of output you want. You can choose **Mailmerge**, **Report**, **Invoice**, or **Labels**. If an option other than Mailmerge is chosen, the **Do** button changes to **Print/Preview**. If you select labels, you can choose from a label type using the default label pull-down.



10. If you're running a mail merge, click the **Do** button. If you're running invoices, reports, or labels, click either the **Preview** or **Print** button. A message indicating the number and total dollar amount billed appears. For mail merges, it also tells you what the name of the file will be and that the file will overwrite any previous file of the same name.
11. Click **OK**. Then to exit, click **Cancel**. You are ready to print the pledge reminders. See page 160 for directions on running mail merges for your word processor.

## How Balances and Delinquent Amounts are Updated

When pledge reminders are generated, the system updates the Pledge tab for each pledge with the following information:

- **Delinquent Amount:** reflects the amount billed in the reminder process, minus any payments.
- **Balance Due:** reflects the outstanding amount due for the pledge.

Each time a pledge payment is made, both the Balance Due and Delinquent Amount decrease accordingly. If a donor makes a payment during a period for which pledge reminders have not been run, the Delinquent Amount will be a negative number. This is accurate, because they have pre-paid and should be credited that amount. Do not manually adjust the Balance Due or Delinquent Amount because they are automatically calculated.

Each time pledge reminders are run and the “Update Delinquent Amounts” check box is selected, the Delinquent Amount is recalculated based on the billing date. The following is an example of how the delinquent and balance due amounts are calculated:

Total Pledge    **400.00**

Amount to Bill **100.00**  
 Start Date **06/01/2007**  
 Frequency **Quarterly**

In this example, the donor will be billed four times at \$100 a quarter, with the first pledge reminder sent out in June 2007. The **Balance Due** and **Delinquent Amount** will be calculated as follows:

Pledge Transactions	Balance Due	Delinquent Amount
Pledge entered in system	400.00	0.00
Pledge reminder sent 6/07	400.00	100.00
Payment made 7/07	300.00	0.00
Pledge reminder sent 9/07	300.00	100.00
Payment made 9/07	200.00	0.00
Early payment 11/07	100.00	-100.00
Pledge reminder sent 12/07	100.00	0.00
Payment made 12/07	0.00	0.00

## Setting an Auto-Reminder to Run Pledge Reminders

You can set DonorPerfect to prompt you to run pledge reminders on a specific day of the month. If you have not yet run reminders for the current month, starting on the day specified, the following message appears when you log into the system:

The pledge reminders are due. Run Mailings, Pledge Reminders.

### ► To set auto-reminder for pledge reminders

1. From the main screen, click the **Utilities** button and select **Change Parameters**, then click **Pledge Parameters**. The Pledge Parameters screen appears.



**Pledge Parameters**

*Pledge Parameters*

**Include Pledges in Financial Reports?**

**Allow Neg Plg Balances?**

**Show Pledges on History List?**

**Last Reminder Sent:** 7/2007

**Show prompt on** 0 **day of month to run reminders**

OK Cancel

2. Select any of the following options, if appropriate:
  - **Include Pledges in Financial Report?:** when selected, includes non-pledge payments, plus pledge totals, in financial reports. If this check box is **not** selected, all gifts, including pledge payments, are included in financial reports, but pledges aren't included. Pledge dates are based on the date the pledge was made. If you select this option, you must also include a filter for all calculated fields. For more information, see "Defining Calculated Fields" in the *DonorPerfect Administrator's Guide*.
  - **Allow Neg Plg Balances?:** when selected, the pledge balance is negative if a donor overpays. If this check box is **not** selected, pledge balances are never less than zero. A negative balance accurately reflects that the pledge has been overpaid, but reports that sum the Balance field for a number of pledges will be inaccurate.
  - **Show Pledges on History List?:** when selected, pledges appear on the History Listing in addition to gifts. If this check box is **not** selected, pledges do not appear on the History List.
3. In the **Show prompt on x day of month to run reminders** check box, enter the day of the month you want to be reminded on.
4. Click **OK**.

If you selected the **Include Pledges in Financial Report?** check box, the following message appears:

To include pledges in calculated fields, set a calculated fields filter (Other Parameters, Calculated fields)

5. If you the above message appears, click **OK** to close it.

## Writing Off Pledge Balances

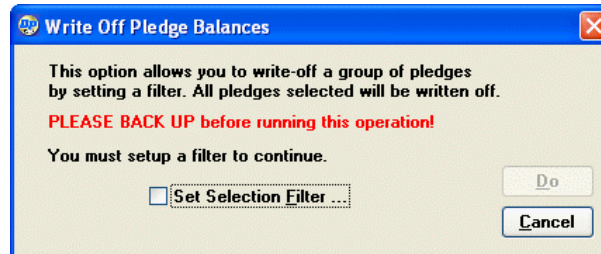
In addition to having the option to enter a write-off amount for a specific pledge (see page 93), DonorPerfect gives you the option to write off the balances for a selected group of pledges. For instance, you may choose to write off all pledges for a campaign that ended over a year ago. When this option is run, the write-off amount for the desired group of pledges becomes filled in with the current balance due, which writes off the remainder of the pledge and makes the balance 0.



**Warning!** It is highly advised that you back up your data before writing off pledge balances.

### ► To write off pledge balances

1. From the main screen, click the **Utilities** button and select **Recalculate** and **Write-off Pledge Balances**. The **Write Off Pledge Balances** dialog box appears.



2. Check the **Set Selection Filter** check box to define a selection filter. Define the filter, and click **OK** at the Selection Verification Screen. For more information on setting up selection filters, see page 118.
3. Click the **Do** button. A message appears telling you all delinquent amounts and balances will be recalculated.
4. Click **OK**. A message appears telling you the delinquent amounts and balances were recalculated.
5. Click **OK**.

## Using Pledge Reports

DonorPerfect provides you with several pledge reports that allow you to review the pledges in your system. For details on the pledge reports available, see the *DonorPerfect Reports* manual.

## 9. Using the Event Management Module

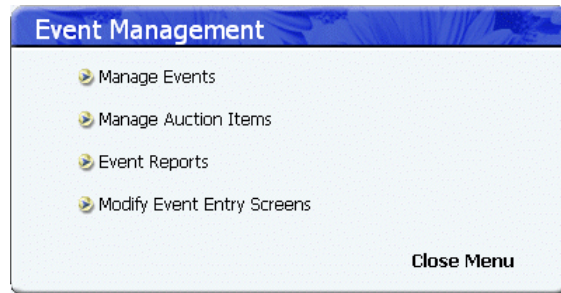
The Event Management Module supports organizations that hold fundraising events by allowing them to easily set up events in DonorPerfect, track responses from potential attendees, and monitor the status of the event using a suite of specially tailored reports.

### Accessing the Event Management Module

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► **To access the Event Management Module**

1. From the Main screen, click on the **Modules** button.
2. Select **Event Management**. The Event Management Module opens:



### Overview

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The Event Management Module allows you to carry out the following basic tasks:

- Managing Events (see page 196)
- Managing Sponsored Events (see page 222)
- Managing Auctions (see page 231)
- Monitoring Events using Event Reports (see page 242)
- Modifying Event Entry Screens (see page 266)

## Managing Events

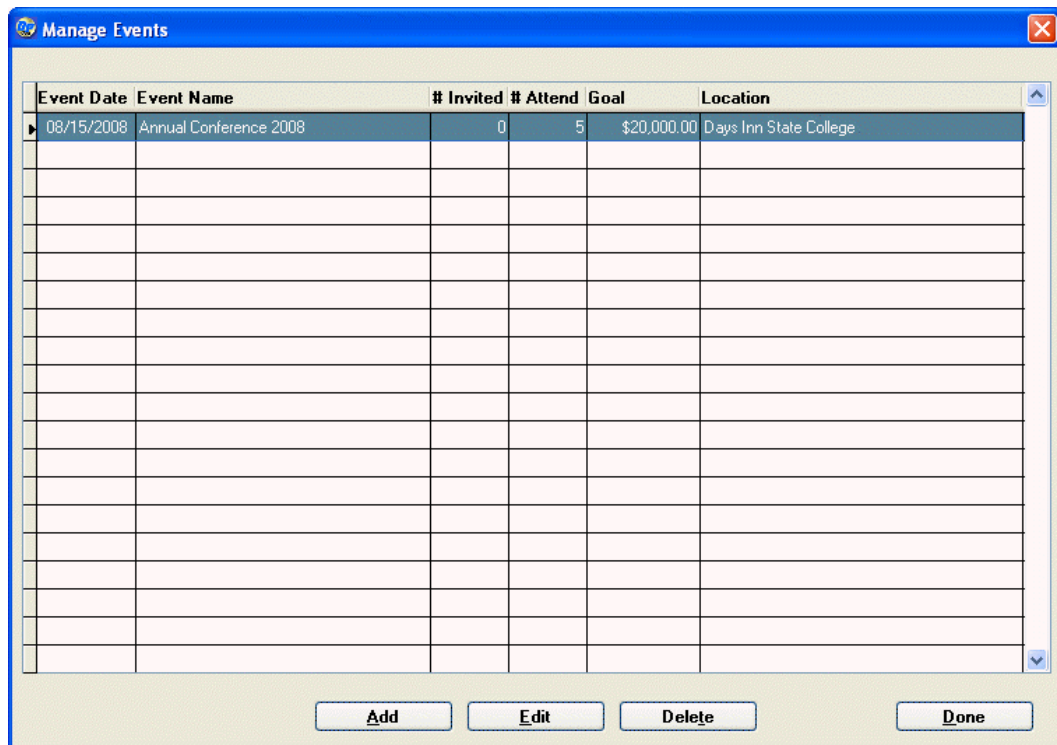
The Manage Events link on the Event Management module allows you to carry out a number of basic tasks related to event management:

- Adding new events
- Tracking expenses for an event
- Editing events
- Deleting events
- Generating invitations for the event.
- Reviewing responses to the invitations
- Managing guests of invitees
- Assigning invitees and guests to tables or teams

### Adding a New Event

► **To add a new event to the event management module**

1. In the Event Management Module, click on the **Manage Events** link. The Manage Events screen opens.



Event Date	Event Name	# Invited	# Attend	Goal	Location
08/15/2008	Annual Conference 2008	0	5	\$20,000.00	Days Inn State College

Buttons: Add, Edit, Delete, Done

2. Click the **Add** button. The Add screen appears:

3. Type in the **Solicitation Code** for the event. If you don't know the **Solicitation Code**, you can search for the code or create a new code.


a. To search for the code:

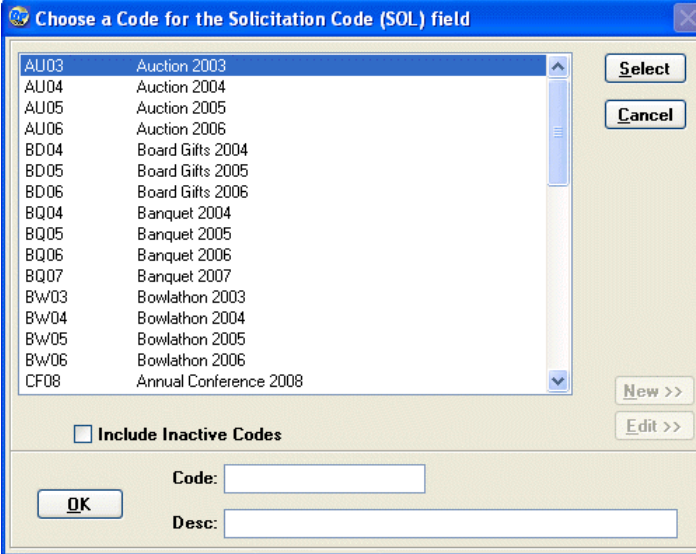
i. Click the magnifying glass button next to the **Solicitation Code** field (🔍). The Choose a Code for the Solicitation Code field screen opens.

ii. If desired, check **Include Inactive Codes** to include the codes which have been marked as **Inactive**.

iii. Select the solicitation code from the list and click **Select**.

b. To create a new solicitation code for the event:

- i. Click the magnifying glass button next to the **Solicitation Code** field (). The Choose a Code for the Solicitation Code field screen opens (see above).
- ii. Click the **New >>** button. The **Code** and **Desc** fields appear at the bottom of the dialog.



The screenshot shows a dialog box titled "Choose a Code for the Solicitation Code (SOL) field". It contains a list of codes and descriptions:

AU03	Auction 2003
AU04	Auction 2004
AU05	Auction 2005
AU06	Auction 2006
BD04	Board Gifts 2004
BD05	Board Gifts 2005
BD06	Board Gifts 2006
BQ04	Banquet 2004
BQ05	Banquet 2005
BQ06	Banquet 2006
BQ07	Banquet 2007
BW03	Bowlathon 2003
BW04	Bowlathon 2004
BW05	Bowlathon 2005
BW06	Bowlathon 2006
CF08	Annual Conference 2008

Buttons include "Select", "Cancel", "New >>", "Edit >>", and "OK". There are also checkboxes for "Include Inactive Codes" and input fields for "Code:" and "Desc:".

- iii. Enter a new solicitation code in the **Code** field.



**Note:** The code must have the same number of characters as the other codes in your system.

- iv. Enter a brief description of the field in the **Desc** field.
- v. Click the **OK** button. The new code will be created and added to the list of available codes. You can now add it like any other code.

4. Once a solicitation code has been selected, you can fill in the following information for the new event:

Field	Description
<b>Event Date</b>	The date on which the even is scheduled to occur. Once the event has been created, this field will no longer be editable.
<b>Event Name</b>	The full name of the event. Once the event has been created, this field will no longer be editable.
<b># Invited</b>	The number of invitations to the event that have been sent out. This field is filled in by the system once you have sent out invitations. This field is not user-editable.
<b># Attendees</b>	The number of invitees that have accepted the invitation to attend the event. This field is filled in by the system once you have marked one or more invitees as having accepted in the Review tab. This field is not user-editable.
<b>Goal</b>	The fundraising goal for the event.

<b>Primary Contact</b>	The name of the primary contact for the event.
<b>Primary Phone</b>	The telephone number of the primary contact for the event.
<b>Primary Email</b>	The email address of the primary contact for the event.
<b>Expenses</b>	The current estimated cost of the event. See “Tracking Expenses,” page 199 for details on filling in expenses.
<b>Location</b>	The name of the event location.
<b>Location Address</b>	The address for the event.
<b>Comments</b>	This space is left for you to enter any additional comments that may be necessary.

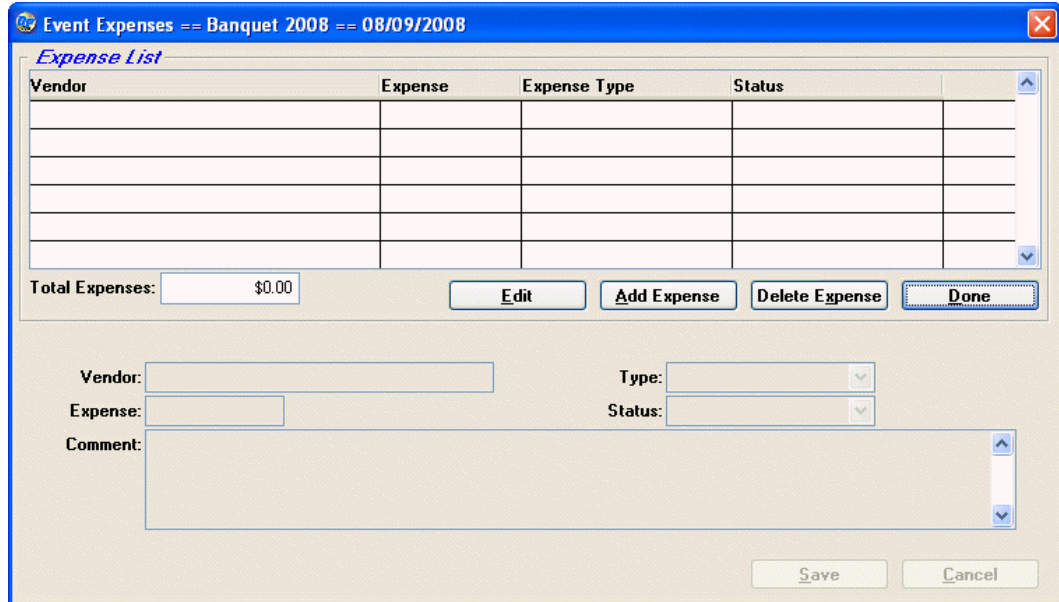
5. Once you are finished entering information about the event, do one of the following:
  - Click the **Done** button to save the event and close the Add screen.
  - Click the **Next** button to advance to the **Invitations** tab. See “Generating Invitations” page 202 for details.

## Tracking Expenses for an Event

The Event Expenses screen allows you to enter the various expenses related to running an event. The current total is displayed in the **Expenses** field in the **Event Details** tab of the Add/Edit Event screen.

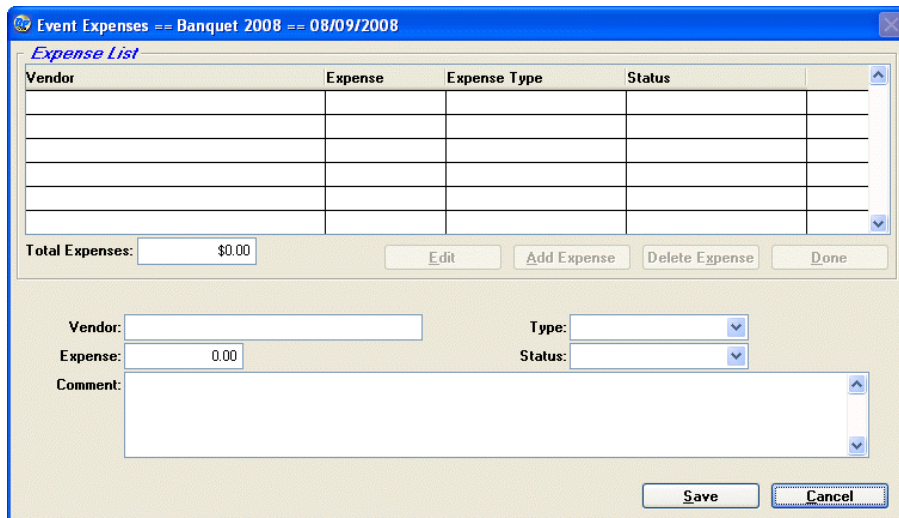
### ► To track expenses for an event

1. Select the **Event Details** tab of the Add/Edit Event screen.
2. Click the **Track Expenses** button. The Event Expenses screen will open:



The Expense List allows you to enter, edit and delete the various expenses associated with running the event.

3. To add an expense item to the list:
  - a. Click the **Add Expense** button. The fields at the bottom of the screen are enabled:



- b. Enter the following information for the expense item:

Field	Description
Vendor	The name of the person or organization you will pay.
Expense	Enter the dollar value of the cost of the expense item.



Field	Description
Type	Select the type of expense item. The default options are <b>Catering, Decorations, Entertainment, Location</b> or <b>Other</b> . Additional types can be added using the Code Maintenance feature.
Status	Select <b>Approved</b> or <b>Pending</b> . Additional statuses can be added using the Code Maintenance feature.
Comment	Enter any additional comments needed for the expense, such as contact information or other details.

- c. Click the **Save** button to save the expense item. It will be added to the Expense List above:

The screenshot shows a software window titled "Event Expenses == Banquet 2008 == 08/09/2008". Inside, there is a table with the following data:

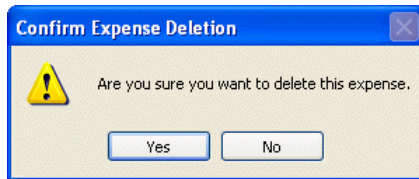
Vendor	Expense	Expense Type	Status
Ambassador Hotel	\$5,000.00	Location	Approved

Below the table, the "Total Expenses:" is \$5,000.00. There are buttons for "Edit", "Add Expense", "Delete Expense", and "Done". At the bottom, the "Vendor" is "Ambassador Hotel", "Expense" is "5000.00", "Type" is "Location", and "Status" is "Approved". The "Comment" field contains "Cost is dependant on filling our room block." There are "Save" and "Cancel" buttons at the bottom right.

- 4. To edit an expense item:
  - a. Select the item in the Expense List.
  - b. Click the **Edit** button. The fields at the bottom of the screen will display the information for the expense item:

This screenshot is identical to the previous one, but the "Edit" button is highlighted in a light blue color, indicating it has been clicked. The form fields at the bottom are populated with the details of the selected expense item.

- c. Edit the information in the fields.
        - d. Click **Save** to save changes, or **Cancel** to abandon them.
- 5. To delete an expense item:
  - a. Select the item in the Expense List.
  - b. Click the **Delete** button. A confirmation dialog appears:



- c. Click the **Yes** button to delete the expense item, or click **No** to cancel.
  - 6. Once you are finished editing expenses, click the **Done** button to close the Event Expenses screen and return to the Event Details tab of the Add/Edit Event screen.

You can return to the Event Expenses screen at any time by clicking the **Track Expenses** button on the Event Details tab again.

## Editing an Event

Once you have added an event, you can close the Add/Edit Event screen at any time by clicking the **Done** button. You can easily reopen the event for editing, or to pick up where you left off, using the Manage Events screen.

### ▶ To edit or reopen an event

- 1. In the Event Management Module, click on the **Manage Events** link. The Manage Events screen opens.
- 2. Select the event you want to edit or reopen in the list of events, and click on the **Edit** button. The Add/Edit Event screen reopens. The process for editing events is identical to adding events.

## Deleting an Event

The Manage Events screen allows you to delete events if necessary.

### ▶ To delete an event

- 1. In the Event Management Module, click on the **Manage Events** link. The Manage Events screen opens.
- 2. Select the event you want to delete in the list of events, and click on the **Delete** button.

## Generating Invitations for an Event

Once you have added a new event to the system, your next step is to send out invitations to your constituents. You do this by generating a data file in the **Invitations** tab of the Add/Edit Event screen. You can then use this data file to do a mail merge when you send out the invitation mailing.

The general steps in generating the data file for invitations are:

1. Decide whether to invite "No Mail" constituents or not.
2. Set a selection filter to screen out unwanted constituents
3. Preview constituents
4. Select the constituents to invite
5. Create contact records
6. Export the data file

### ***Including "No Mail" Constituents in Invitations***

Check **Include "NO MAIL" Names** to send invitations to donors whose records are marked **NO Mail**.

### ***Setting a Selection Filter to Screen Out Unwanted Constituents***

By default, the Invitations tab will display every donor in your DonorPerfect system. This can be inefficient, particularly for an event that will draw from a relatively small geographic area.

The solution is to set up a selection filter that screens out the unwanted donors. For instance, you can set up a filter that selects only those donors who are located in the same city and state as the event.

To begin setting up a selection filter, check the **Set Selection Filter** checkbox. For details on using selection filters, see “Working with Selection Filters” page 118.

### Previewing Constituents

Once you have set up a selection filter (or decided not to), click the **Preview Constituents** button to see a listing of all the constituents in the system that match your selection filter criteria.

**Edit Event : Annual Conference 2008**

1 Event Details   2 **Invitations**   3 Review   4 Guests   5 Tables/Teams

Include "NO MAIL" Names    Set Selection Filter ...

**Select** ID #   First Name   Last Name   Phone Number   Email   Inv.?

<input type="checkbox"/>	2	Joan	Jett	HOME: (213)895-6530		No
<input type="checkbox"/>	3	George	<a href="#">Judson</a>	HOME: (310)625-5733		Yes
<input type="checkbox"/>	4	Jim	<a href="#">Barkley</a>	HOME: (208)751-8843		No
<input type="checkbox"/>	6	Jacob	<a href="#">Dotsaur</a>	HOME: (713)878-9059	jake@yahoo.com	No
<input type="checkbox"/>	8	Jeanella	<a href="#">Tenievve</a>	HOME: (313)896-9604		No
<input type="checkbox"/>	9	Tim	<a href="#">Tarkonston</a>	HOME: (414)669-3433		No
<input type="checkbox"/>	10	Edward	<a href="#">Hobart</a>		dpsupp@aol.com	No
<input type="checkbox"/>	12	Calvin	<a href="#">Johnson</a>	HOME: (512)755-8109		No
<input type="checkbox"/>	15	Richard	<a href="#">Seversen</a>	HOME: (805)896-9564		No
<input type="checkbox"/>	16	Roger	<a href="#">Sandstone</a>	HOME: (215)628-0400	info@donorperfect.com	Yes
<input type="checkbox"/>	17	Ronald	<a href="#">Solakian</a>	HOME: (215) 635-4112		No
<input type="checkbox"/>	18	Edmund	<a href="#">Soffer</a>	HOME: (215)635-9166		No
<input type="checkbox"/>	19	Albert	<a href="#">Mansen</a>	HOME: (401)896-9112		No
<input type="checkbox"/>	21	Paul	<a href="#">Smover</a>	HOME: (401)896-7835		No
<input type="checkbox"/>	22	William	<a href="#">Seitz</a>	HOME: (716)822-5162		No
<input type="checkbox"/>	25	Floyd	<a href="#">Taggett</a>	HOME: (713)615-2266		No

0 Total Selected   Suggested Action: [Select Records & Create Contact Records](#)

If desired, you can adjust your selection filter settings and click the **Preview Constituents** button again to refresh the listing of constituents.



**Note:** Clicking on the hyperlink in the last name of a constituent will open the Info Sheet listing for that constituent. See the *DonorPerfect Reports Guide* for details on the Info Sheet listing.

### Selecting the Constituents to Invite

To select a constituent to be included in the data file for the event mailing, check the box in the **Select** column for that constituent.



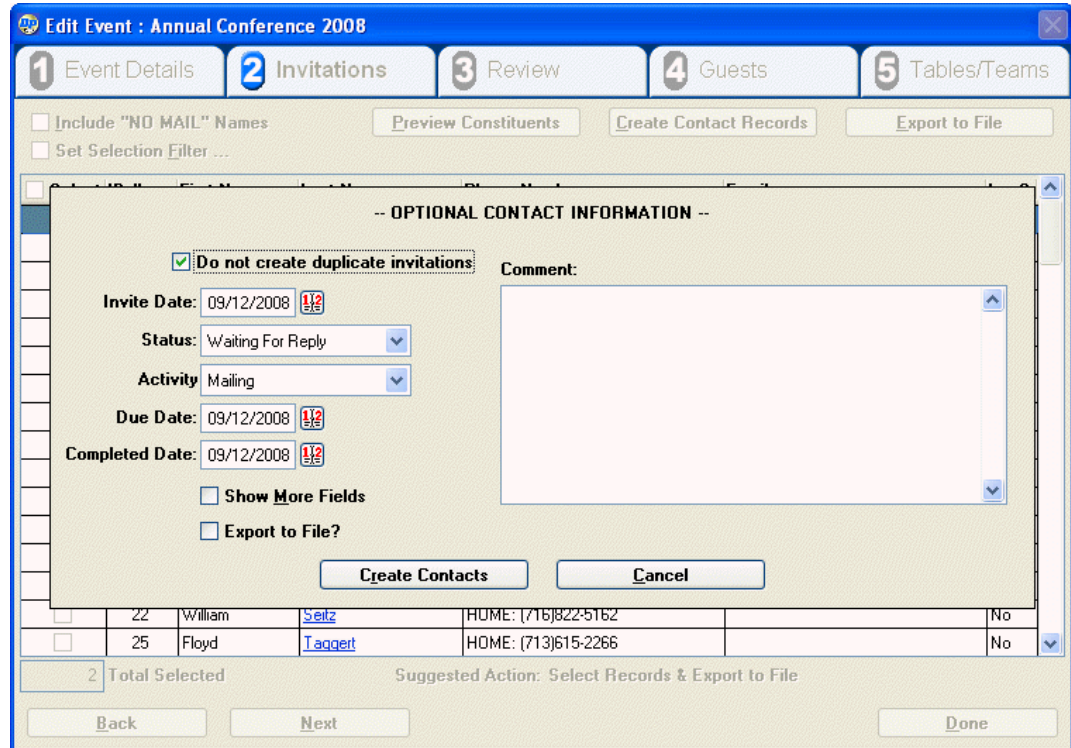
**Note:** Checking the box in the **Select** column header selects all constituents that are displayed. Clearing the box in the **Select** column header clears the checkboxes of all constituents.

### Creating Contact Records for Invitees

Once you have selected the constituents you want to invite to the event, the next step is to create contact records in the system that represent the invitations that are about to be sent out.

► **To create contact records for the invitations**

1. Click the **Create Contact Records** button. An Optional Contact Information window opens:



2. The following options are available for the contacts:

Option	Description
<b>Do not create duplicate invitations</b>	If checked, contacts will not be created for constituents who already have a contact with the solicitation code for this event.
<b>Invite Date</b>	The date on which the invitations went out, or will go out.
<b>Status</b>	The current status of the invitee. Choose from <b>Waiting for Reply</b> , <b>Paid</b> , <b>Not Attending</b> , <b>Paid, Attending</b> , <b>Attending</b> , or <b>Not Attending</b> . You can add additional statuses using the Code Maintenance feature.
<b>Activity</b>	The type of contact associated with the invitation, for instance, <b>Mailing</b> .
<b>Show More Fields</b>	If checked, the Contact screen will open, giving you full access to all the fields on that screen. See "Maintaining Contact Management Information" page 112 for details on the fields. Click the <b>Done</b> button on the Contact screen to return to this screen.

Option	Description
<b>Export to File?</b>	If checked, the Export to File screen will automatically open as soon as the <b>Create Contacts</b> button is clicked (see “Exporting the Data File,” next).
<b>Comment</b>	This field allows you to enter any other information needed. Remember that the information entered into the field will be included in the contact record for all of the contacts, not just one.

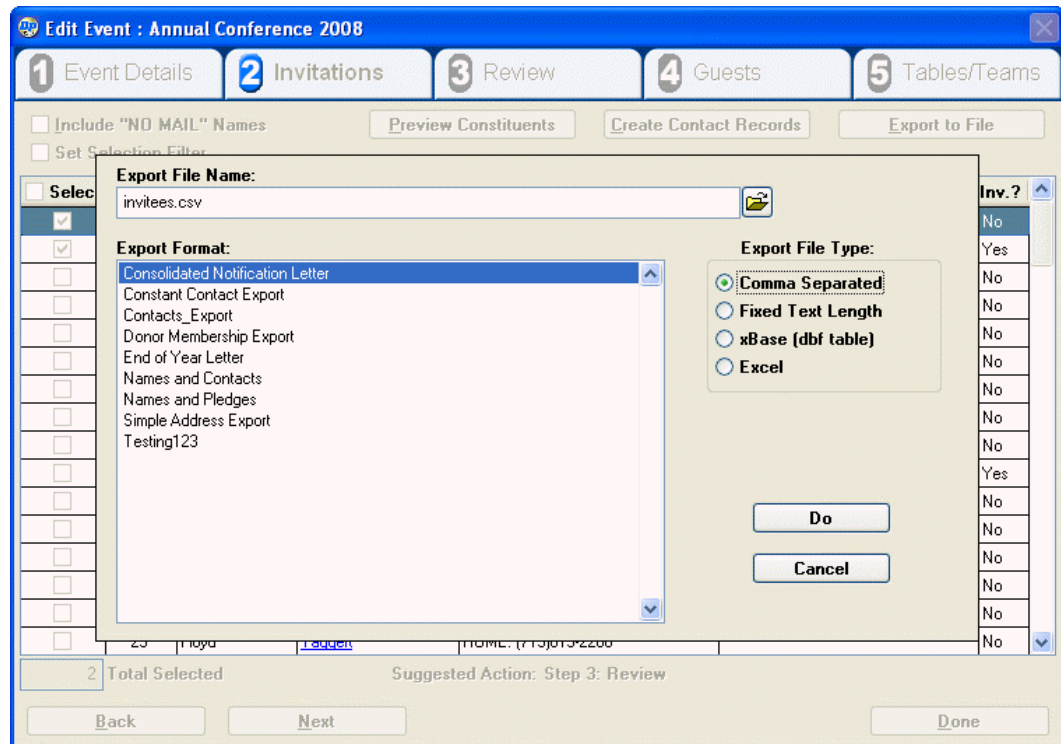
- Once you have selected the options you want, click the **Create Contacts** button to create the contacts for the selected constituents. If **Export to File** was checked, you will go straight into the Export to File screen (see “Exporting the Data File,” next). Otherwise, you will be returned to the Invitations Tab.

### Exporting the Data File

In order to actually send out the invitations for your event, you will need to export the contact information to a data file that can be used in a mail merge or read into some other application.

#### ► To export the contact information for your invitees

- If you checked the **Export to File** checkbox while creating contacts, the Export to File screen will open automatically. For everyone else, click the **Export to File** button on the **Invitations** tab of the Add/Edit Events screen.



2. Under **Export File Type**, select the type of file that you want to export:

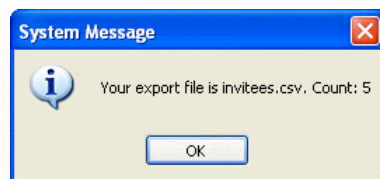
File Type	Definition
<b>Comma Separated</b>	Comma separated value files are text files in which each record is contained on a separate line. Each of the fields in the record are enclosed by quotation marks, and each field is separated from the next by a comma. This file type can easily be read into spreadsheets and office suites. Comma separated value files are usually given a file extension of <b>.csv</b> .
<b>Fixed Text Length</b>	Fixed text length files are text files in which each record is contained on a separate line. Each field in the record is defined as being a fixed number of characters long, and each record line simply lists the fields one after another without any separators. Fields that are empty or shorter than the fixed length are padded out with spaces, and data that is too long to fit into the field is truncated. Fixed length data files are given a file extension of <b>.txt</b> .
<b>xBase (dbf table)</b>	A standard database data file type, xBase files are structured database files that can contain a variety of information. They can be read into a wide variety of databases. xBase files are given a file extension of <b>.dbf</b> .
<b>Excel</b>	The file will be exported as a standard Microsoft Excel database file, and given a file extension of <b>.xls</b> .

3. Select the export template that you want to use from the **Export Format** list. The export template will determine which database fields get exported into the files, and their order in the output file.



**Note:** Export templates can be set up in the Export Templates screen. See “Managing Export Templates” page 144 for details on setting up export templates.

4. Specify a file name and path and path in the **Export File Name** field, or click on the folder icon to select a folder and output file name.
5. Click the **Do** button to export the file. A system message appears:



6. Click the **OK** button. You will be returned to the **Invitees** tab of the Add/Edit Event screen. See “Reviewing Invitee Statuses,” next page, for details.

## Reviewing Invitee Statuses

The **Review** tab of the Add/Edit Event screen allows you to review and update the status of the invitees to the event. You can also record a payment from an invitee, or create a pledge for one. Lastly, you can specify if an attendee is bringing additional guests.

### *Displaying the Status of All Invitees*

By default, no records are displayed in the **Review** tab. To display the records for all invitees to the event, click the **Preview** button.

Select ID #	First Name	Last Name	Phone Number	Status	Paid	Guests
<input type="checkbox"/>	16	Roger	Sandstone	HOME: (215)628-0400	Paid, Attending	Yes 2
<input type="checkbox"/>	41	Fred	Garvin	HOME: (212)354-6245	Attending	No 0
<input type="checkbox"/>	48	William	Shakespeare		Paid, Attending	No 2
<input type="checkbox"/>	105	Arlen	Specter	WORK: (555)555-1212	Paid, Attending	Yes 0
<input type="checkbox"/>	111	Leah	Zimmerman	: (212)354-6245	Paid, Attending	Yes 1
<input type="checkbox"/>	117	William H	Gates		Paid, Attending	Yes 0
<input type="checkbox"/>	123	Anthony	Stark	HOME: 310-555-1234	Paid, Attending	Yes 1
<input type="checkbox"/>	1	John D.	McClurkin	HOME: (610)444-6555	Waiting For Reply	No 0
<input type="checkbox"/>	125	Melinda	Gates		Paid, Attending	No 0
<input type="checkbox"/>	127	Stephen	Balmer		Paid, Attending	No 0
<input type="checkbox"/>	3	George	Judson	HOME: (310)625-5733	Waiting For Reply	No 0



### ***Displaying the Status of Specific Invitees***

It is possible to narrow the focus of the Review tab so that only certain invitees are displayed. This can be useful when large numbers of invitees are involved, for instance.

► **To display only specific invitees**

1. Enter all or the beginning of a **First Name** or **Last Name** or **ID #** into the fields provided at the top of the tab. Only invitees that match the entered text will be displayed.
2. To display those invitees whose status is set to **Attending**, or **Paid, Attending**, check the **Show Attending** checkbox. If cleared, attendees with those statuses will not be displayed.
3. To display those invitees whose status is set to **Not Attending**, or **Paid, Not Attending**, check the **Show Not Attending** checkbox. If cleared, attendees with those statuses will not be displayed.
4. To display invitees with all other status, check the **Show All Others** checkbox. If cleared, invitees with other statuses will not be displayed.
5. Once you have finished setting options, click the **Preview** button to update the display.

### ***Updating the Status of an Invitee***

You can change the status of an invitee to reflect responses to your invitations.

► **To change the status of an invitee**

1. Select the invitee by checking the box in the **Select** column for their record.
2. Set **New Status** to the new status you want the invitee to have.
3. Click the **Update Status** button. The status of the invitee will be changed to match the **New Status** setting.

### ***Recording Payments from an Invitee***

Once you receive a payment, you can add a payment record for that invitee. This will change the status of the attendee to **Paid, Attending**.

► **To add a payment record for an invitee**

1. Select the invitee by checking the box in the **Select** column for their record.
2. Click the **Make Payment** button. A window similar to the Gift dialog appears:

3. Enter the information for the payment into the fields provided. Note that you can specify the number of **Additional Guests** that will be accompanying the invitee. For explanation of the remaining fields, see “Adding Gifts” page 76.
4. When finished, click the **Make Payment** button. You will be returned to the **Review** tab of the Add/Edit Event screen, and the invitee’s status will be changed to **Paid, Attending**.

### ***Creating Pledges for Invitees.***

You can create a pledge for an invitee in lieu of a payment. This will change the status of the attendee to **Paid, Attending**.

#### ► **To add a pledge for an invitee**

1. Select the invitee by checking the box in the **Select** column for their record.
2. Click the **Create Pledge** button. A window similar to the Pledge dialog appears:

**Edit Event : Annual Conference 2008**

1 Event Details   2 Invitations   3 Review   4 Guests   5 Tables/Teams

Event Date: 08/15/2008   Solicitation Code: CF08

Event Name: Annual Conference 2008

Guest Name: Arlen Specter

Additional Guests: 0

Pledge Date: 06/18/2008   Start Date: 06/18/2008

Total   Initial Payment

Number of Payments   Billing Amount

Billing Cycle   Send Reminder?

General Ledger   Campaign

Thank You Letter   Gift Solicitor

Thank You Address: MAIN - Arlen Specter/670 Oak Street/Harrisburg, PA 19871   Pledge #: 920

Cancel   Create Pledge

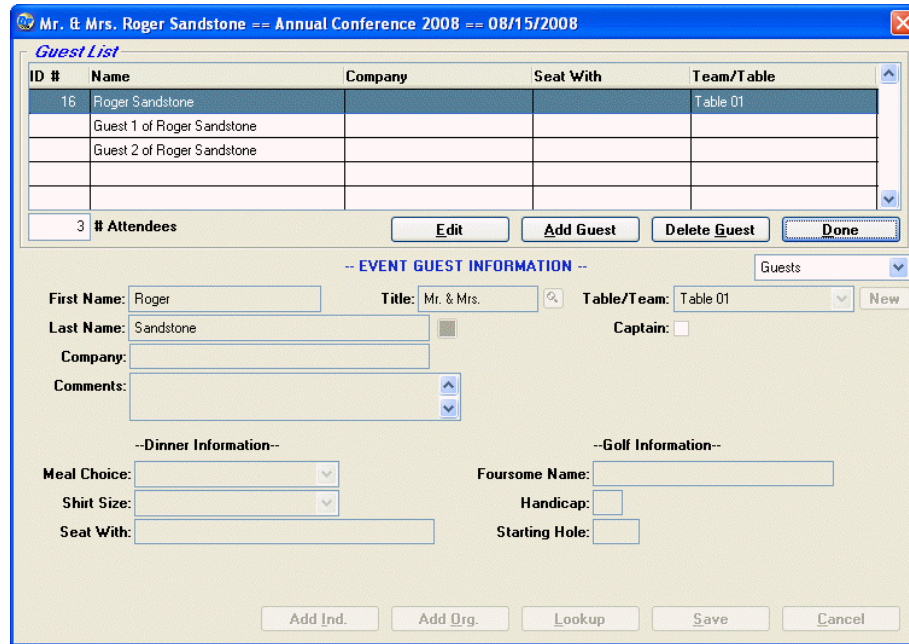
Back   Next   Done

3. Enter the information for the payment into the fields provided. Note that you can specify the number of **Additional Guests** that will be accompanying the invitee. For explanation of the remaining fields, see “Adding Pledges” page 91.
4. When finished, click the **Create Pledge** button. You will be returned to the **Review** tab of the Add/Edit Event screen, and the invitee’s status will be changed to **Paid, Attending**.



### Editing Guest Details

To view more details about invitees' guests, and to add, edit and delete guests, select an invitee and click on the **Edit Guest Details** button. The Guest Details screen opens:

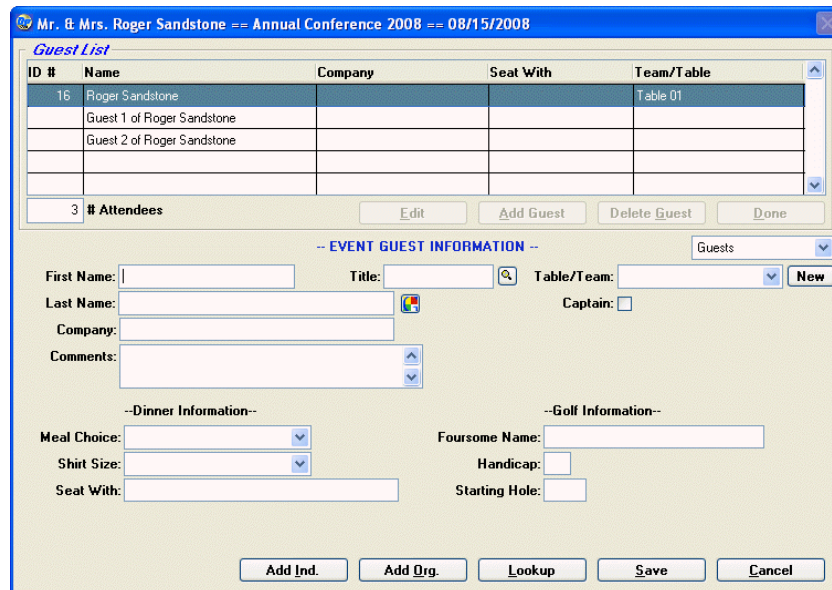


If guests were specified when a payment or pledge record was created, the guests are listed as "Guest *n* of *invitee*." You can edit the guest records to provide full names later (see below).

### Adding Guests

► To add a guest

1. Click the **Add Guest** button. The fields in the lower half of the screen are enabled so that you can fill in details.



2. Fill in the following information:

Field	Description
<b>First Name</b>	The first name of the guest
<b>Last Name</b>	The last name of the guest.
<b>Company</b>	The company affiliation of the guest, if any.
<b>Comments</b>	Enter any additional information or comments here.
<b>Title</b>	The formal title of the guest, such as Dr.
<b>Table/Team</b>	If desired, you can assign the guest to a table or team by selecting it here. Click the <b>New</b> button to create a new table or team (see “Managing Tables and Teams” on page 215 for details).
<b>Captain</b>	Check to indicate that this person is the team captain.



**Note:** You can add additional user-defined fields to this dialog, such as the Dinner Information and Gold Information fields in the illustration. See “Customizing Screens and Tables” in the *DonorPerfect Administrator’s Guide* for details.

3. When finished, click the **Save** button to save the guest information.

### Editing Guest Details

You can edit the details of an existing guest entry. For instance, if a guest was added as a generic “Guest 2 of *Invitee*” and you later get an actual name, you can go in and update the entry.

#### ► To edit guest details

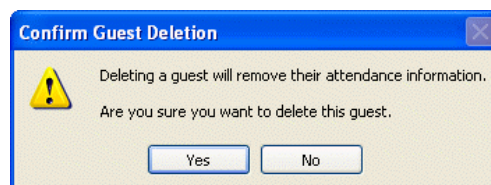
1. Select the guest entry in the grid at the top of the screen.
2. Click the **Edit** button.
3. Edit the guest’s details in the fields in the lower half of the screen.
4. When finished, click the **Save** button to save the changes to the guest details.

### Deleting Guests

If a guest cancels out of an event, you can remove their record from the system.

#### ► To delete a guest entry

1. Select the guest entry in the grid at the top of the screen.
2. Click the **Delete Guest** button. A confirmation screen appears.



3. Click **Yes** to delete the guest.

### *Checking to See if a Guest is Already Listed as a Donor*

► **To check to see if a guest is already listed as a donor in your system**

1. Select the guest entry in the grid at the top of the screen.
2. Click the **Edit** button.
3. Click the **Lookup** button. A message will appear telling you whether the guest is found in the database or not:

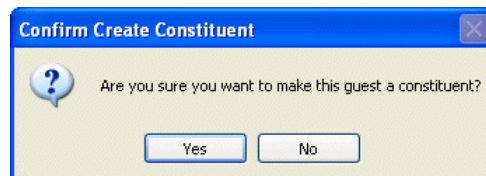


### *Creating Donor Records for Guests*

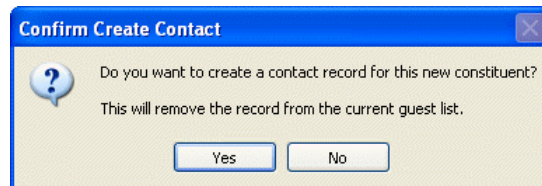
If you want to create a donor record for one of your guests, you can create either an individual record or an organization donor record.

► **To create an individual donor record from a guest record**

1. Select the guest entry in the grid at the top of the screen.
2. Click the **Edit** button.
3. Click the **Add Ind.** button. A confirmation screen appears:



4. Click the **Yes** button.

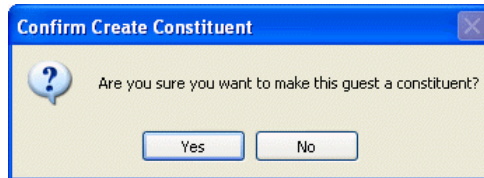


5. Click the **Yes** button.

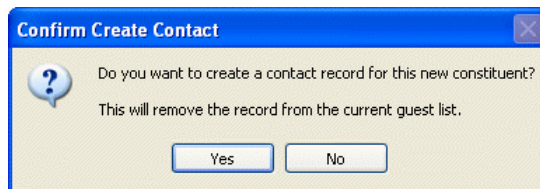
A new donor record will be created for the guest. The guest's old guest record will be deleted, and the donor record will be used to re-add the guest as a regular invitee. The invitee record will have the same table/team memberships as the old guest record.

► **To create an organization donor record from a guest record**

1. Select the guest entry in the grid at the top of the screen.
2. Click the **Edit** button.
3. Click the **Add Org.** button. A confirmation screen appears:



4. Click the **Yes** button.



5. Click the **Yes** button.

A new organization donor record will be created for the guest. The **Last Name** field will be mapped to the **Org. Name**, and the **First Name** field will be mapped to the **Org. Prefix**.

The guest's guest record will be deleted, and the donor record will be used to re-add the guest as a regular invitee. The invitee record will have the same table/team memberships as the old guest record.



## Assigning Invitees and Guests to Tables or Teams

The **Tables/Teams** tab of the Add/Edit Event screen allows you to assign the guests and invitees to tables or teams. You can also add, edit and delete tables/teams.

There is no functional difference between a “table” or a “team,” either one is simply a group that you can add guests to or remove them from.

### ***Adding a New Table or Team***

You can add either a single new table or team, or a numbered series of them (**Team 1, Team 2, Team 3**, etc.).

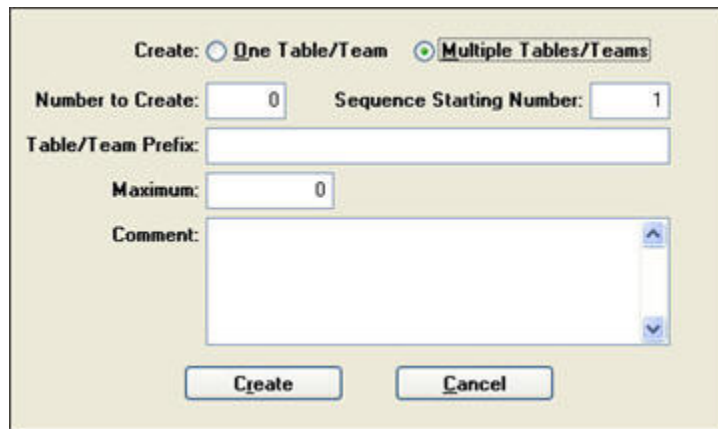
#### ► **To add a new table or team**

1. Click on the **New** button.

2. Set **Create** to **One Table/Team**.

3. Enter a **Name** for the table or team.
  4. If desired, set **Maximum** to the maximum number of people who can be assigned to a table or a team.
  5. Any remaining information that needs to be noted down about a team or table can be entered into the **Comment** field.
  6. Once you are finished entering information, click the **Done** button.
- **To add a numbered series of new tables or teams**

1. Click on the **New** button.



2. Set **Create** to **Multiple Tables/Teams**.
3. Set **Number to Create** to the number of tables or teams you want to create.
4. Set **Sequence Starting Number** to the number you want to assign to the first table/team in the series. For instance, if you want to create **Team 1** through **Team 8**, enter a **1** in this field.
5. Enter the **Table/Team Prefix** that will be combined with the number to make the team or table names. For instance, to create **Table 1**, **Table 2**, and so on, type **Table** into the field.
6. If desired, set **Maximum** to the maximum number of people who can be assigned to a table or a team.
7. Any remaining information that needs to be noted down about the teams or tables can be entered into the **Comment** field. The same comment will be entered for all the teams/tables created.
8. Once you are finished entering information, click the **Create** button.

### ***Editing a Table or Team***

► **To edit a table or team**

1. Select the table or team from the **Table/Team** list.
2. Click the **Edit** button.

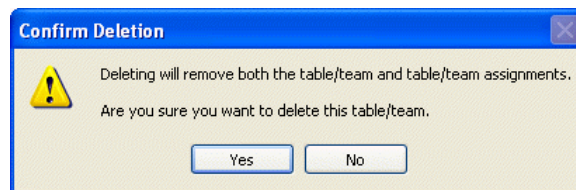
3. Edit the information for the team (the fields are identical to those used to create the table or team).
4. Once you are finished editing, click the **Done** button.

### ***Deleting a Table or Team***

If desired, you can delete a table or team. This will not delete the attendees currently assigned to the table, who will be put back into the **Unassigned Attendees** list.

#### ► **To delete a table or team**

1. Select the table or team from the **Table/Team** list.
2. Click the **Edit** button.
3. Click the **Delete** button.



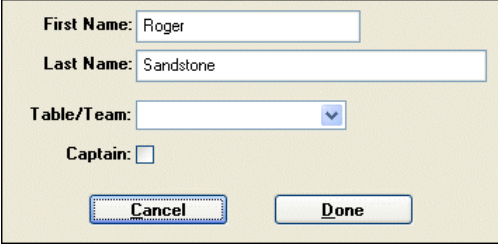
4. Click **Yes** to delete the table, or **No** to cancel deletion.

### ***Managing the Members of a Table or Team***

#### *Adding Attendees to a Table or Team*

#### ► **To add unassigned attendees to the table or team**

1. Select the table or team from the **Table/Team** list. The names currently assigned to the table or team appear in the right-hand list.
2. Use one of the following methods to add attendees to the table or team.
  - a. Using the **Move ->** button:
    - i. Select one or more attendees in the **Unassigned Attendees** list.
    - ii. Click the **Move ->** button.
  - b. Using the mouse:
    - i. Click and drag attendees into the right-hand list. (This does not work when the **Table/Team** list is set to **All Tables/Teams**.)
  - c. By right-clicking on the unassigned attendee:
    - i. Right-click on an attendee in the **Unassigned Attendees** list. The following screen opens:



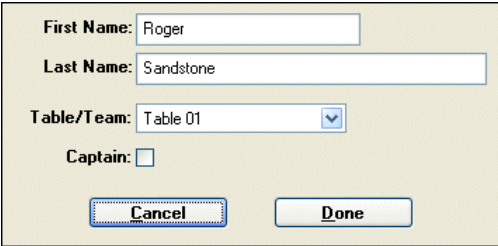
First Name: Roger  
Last Name: Sandstone  
Table/Team:   
Captain:   
Cancel Done

- ii. Set **Table/Team** to the table or team that you want to add the attendee to.
- iii. Click the **Done** button.

### Removing Attendees from a Table or Team

► **To remove attendees from a table or team:**

1. Select the table or team from the **Table/Team** list. The names currently assigned to the table or team appear in the right-hand list.
2. Use one of the following methods to add attendees to the table or team.
  - a. Using the **Move ->** button:
    - i. Select one or more attendees in the right side list.
    - ii. Click the **<- Move** button.
  - b. Using the mouse:
    - i. Click and drag attendees from the right-hand list into the **Unassigned Attendees** list. (This does not work when the **Table/Team** list is set to **All Tables/Teams**.)
  - c. By right-clicking on the attendee:
    - i. Right-click on an attendee in the right-hand list. The following screen opens:



First Name: Roger  
Last Name: Sandstone  
Table/Team: Table 01  
Captain:   
Cancel Done

- ii. Set **Table/Team** to be blank.
- iii. Click the **Done** button.

### Removing all Attendees from a Team or Table

► **To remove all attendees from a team or table:**

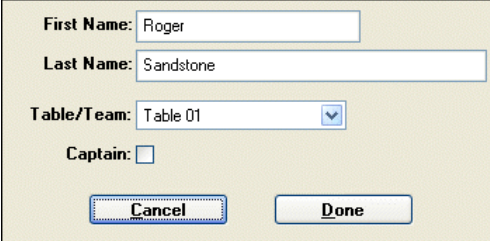
1. Select the table or team from the **Table/Team** list. The names currently assigned to the table or team appear in the right-hand list.
2. Click the **<< All** button.

### Setting an Attendee to be the Captain of a Team or Table

If desired, you can set one or more members of a table or team to be a captain.

► **To set a member of the team or table to be a captain**

1. Select the table or team from the **Table/Team** list. The names currently assigned to the table or team appear in the right-hand list.
2. Use one of the following methods to make one of the attendees the captain:
  - a. Using the **Captain** button:
    - i. Select the attendee in the right side list.
    - ii. Click the **Captain** button.
  - b. By right-clicking on the attendee:
    - i. Right-click on an attendee in the right-hand list. The following screen opens:



The screenshot shows a dialog box with a light beige background. It contains the following elements:

- First Name:** A text input field containing the name "Roger".
- Last Name:** A text input field containing the name "Sandstone".
- Table/Team:** A dropdown menu showing "Table 01".
- Captain:** A checkbox that is currently unchecked.
- Buttons:** Two buttons at the bottom: "Cancel" (with a dashed border) and "Done".

- ii. Check **Captain**.
- iii. Click the **Done** button.

### Exiting the Add/Edit Event Screen

Once you are finished adding or editing an event, click the **Done** button to close the Add/Edit Event screen and return to the Manage Events screen.

## Managing Sponsored Events

Sponsored Events are events like walk-a-thons, dance-a-thons, or bowl-a-thons, in which donors sponsor one or more players. The donors pledge to contribute some amount of money for each unit of activity (mile walked, hour danced, home run scored, etc.).

The total contribution will be the pledge per unit of activity, multiplied by the number of units completed by the players.

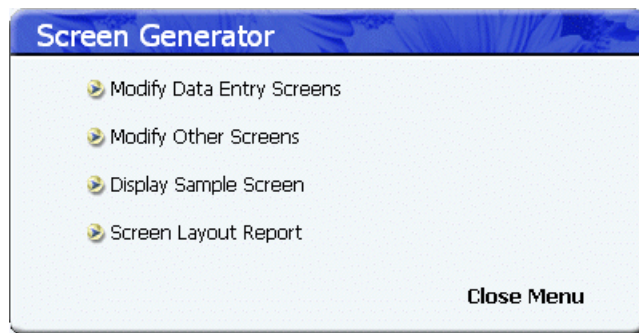
In order to manage a sponsored event through DonorPerfect, some setup is required.

## Setting Up DonorPerfect to Manage Sponsored Events

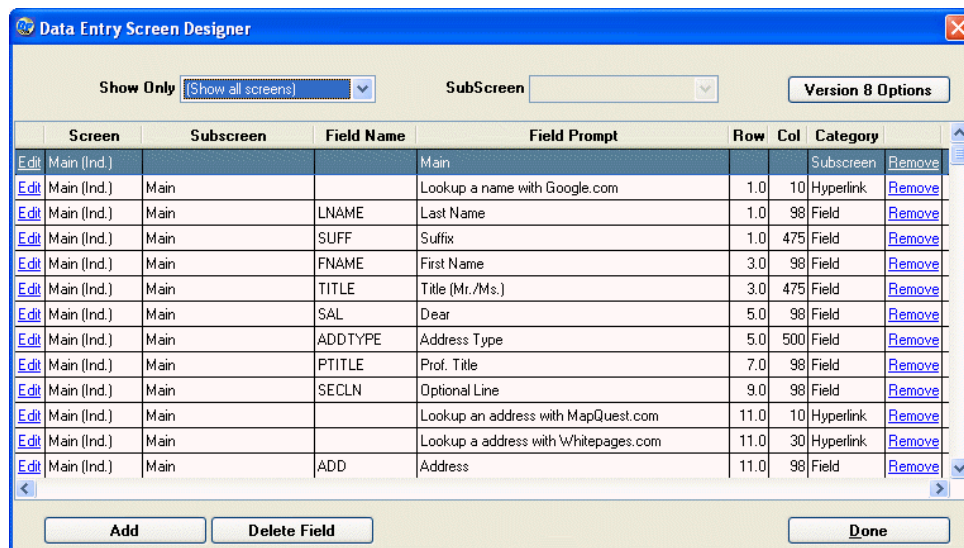
In order to manage a sponsored event in DonorPerfect, you must first add the **PLAYER** and **PLGPER** fields to the Pledge Entry screen to allow you to specify the player associated with the pledge, and the pledge per unit of activity completed.

### ► To add the required fields to the Pledge Entry screen

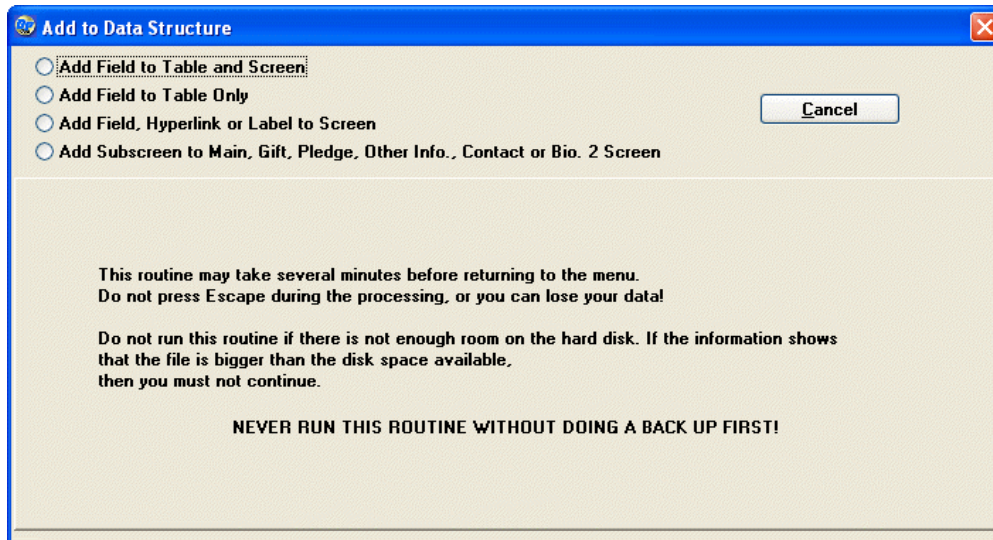
1. From the main screen, click on the **Utilities** button, and select **Screen Generator**.



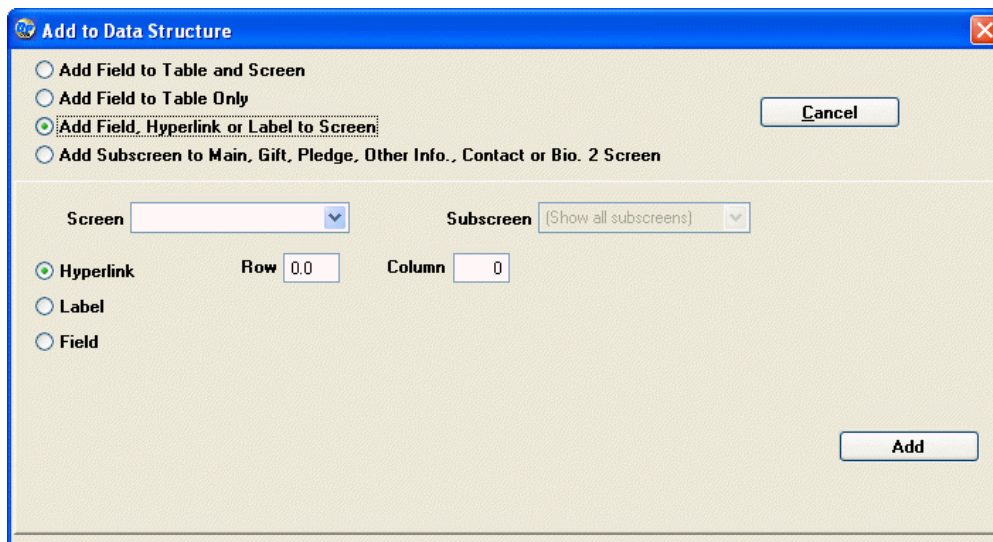
2. Click on the **Modify Data Entry Screens** link. The Data Entry Screen Designer opens:



3. Click the **Add** button.



4. Select **Add Field, Hyperlink or Label to Screen**. New fields appear in the lower part of the screen:



5. Set **Screen** to **Pledge**. Leave **Subscreen** set to Pledge.
6. Select **Field**. More fields appear:

7. Set **Row** to **29** and **Column** to **440**.
8. Type **Player** into the **Prompt** field.
9. Set **Table** to **Gifts/Pledges**.
10. Set **Field Name** to **PLAYER**.
11. Click the **Add** button. The Edit Field Characteristics screen appears:

12. If desired, enter a **Tool Tip** for the Player field, then click the **Save** button. You will be returned to the Data Entry Screen Designer screen, and the new field will appear in the list of fields.
13. Repeat steps 3-6 to add a second field to the Pledge screen.
14. Set **Row** to **31** and **Column** to **440**.



15. Type **Pledge Per** \_\_\_ into the **Prompt** field.
16. Set **Table** to **Gifts/Pledges**.
17. Set **Field Name** to **PLGPER**.
18. Click the **Add** button. If desired, add a **Tool Tip**, then click the **Save** button. You will be returned to the Data Entry Screen Designer screen, and the second field will appear in the list of fields.
19. Click the **Done** button to exit the **Data Entry Screen Designer** screen.

The fields will now show up on the Pledge Entry screen:

The screenshot shows the 'Pledge' tab of the 'Mr. William H Gates' record. The 'Pledge' dropdown menu is set to 'Pledge'. The 'Pledge Date' and 'Start Date' are both 07/23/2008. The 'Total' and 'Initial Payment' are 0.00. The 'Number of Payments' is empty. The 'Billing Cycle' is a dropdown menu. The 'General Ledger' and 'Thank You Letter' are dropdown menus. The 'Write-off Amount' is 0.00 and the 'Write-off Date' is //. The 'Balance Due' is 0.00, 'Delinquent Amount' is 0.00, and 'Pledge ID #' is 977. The 'Last Paid' and 'Last Date Billed' are //. The 'Player' dropdown menu is highlighted with a red circle, and the 'Pledge Per' field is set to 0.00. The 'Thank You Address' is MAIN - William H Gates/Microsoft Corporation/1 Microsoft. The 'Done' button is visible at the bottom right.

This is all the customization you need to do to your DonorPerfect system in order to manage sponsored events.

## Running Sponsored Events in DonorPerfect

Once you have set up the required fields in the Pledge Entry screen, you are ready to run sponsored events in DonorPerfect.

### ► To run a sponsored event using DonorPerfect

1. Create **PLAYER** code entries for all of the participants in the sponsored event, using the Code Maintenance screen.
2. Create pledge entries for the donors who pledge to donate to the sponsored event, specifying the player they are sponsoring, and the amount they are pledging per unit of activity.
3. Once the event is over, return to the Code Maintenance screen and enter the number of units of activity (hours danced, miles walked, etc.) that each player completed into

the **Number Played** field for their **PLAYER** code. Combined with the **Pledge Per \_\_\_** setting, this allows the system to compute the total pledge owed by each donor.

- Click the **Update Sponsored Pledges** button in the Report Options area of the Constituent Report or the Participant Report. This will calculate the amounts owed based on the number played, multiplied by the pledge per unit of activity.



**Important!** You **MUST** click the Update Sponsored Pledges button in the Report Options area before running the Constituent Report or Participant Report. If you do not click the button before running the report, the calculations for the amount owed for each pledge will be out of date.

- Run the Constituent Report and the Participant Report to see the overall results of the sponsored event.
- Send out pledge reminders to each donor, notifying them of the total pledge owed.

### Entering Player Codes for Sponsored Events

Before you can begin entering pledges for a sponsored event, you must first create **PLAYER** codes for each of your players (the fundraisers doing the walking, dancing, etc.) in the Code Maintenance screen. Once the **PLAYER** codes have been created, the players will appear in the Player field you created in the Pledge Entry screen.

#### ► To create **PLAYER** codes for the players in the event


- From the main screen, click on the **Utilities** button and select **Code Maintenance**.

Field	Code	Description	Inactive?	Cr_dt	Cr_by	Mod
ACTMITY	CD	Call DonorPerfect	N	01/01/2000	DPW	09/2
ACTMITY	CS	Sales: 800-220-8111	N	01/01/2000	DPW	01/0
ACTMITY	EI	Email In	N	07/27/2007	DPW	/ /
ACTMITY	EO	Email Out	N	07/27/2007	DPW	/ /
ACTMITY	GP	Grant Proposal	N	01/01/2000	DPW	01/0
ACTMITY	GR	Grant Report	N	01/01/2000	DPW	01/0
ACTMITY	LT	Letter	N	01/01/2000	DPW	01/0
ACTMITY	MA	Mailing	N	01/01/2000	DPW	01/0
ACTMITY	ME	Meeting	N	01/01/2000	DPW	01/0
ACTMITY	TE	Telephone Call	N	01/01/2000	DPW	01/0
ACTMITY	VI	Visit	N	01/01/2000	DPW	01/0
ADDTYPE	HOME	Home Address	N	01/01/2000	DPW	01/0
ADDTYPE	VACA	Vacation Home	N	01/01/2000	DPW	01/0
ADDTYPE	VOLA	Volunteer Address	N	06/08/2005	DPW	03/0
ADDTYPE	WORK	Work Address	N	01/01/2000	DPW	01/0
ASSIGNMENT	CHR	Chairperson	N	01/01/2000	DPW	01/0
BYWHOM	CTS	Casey T. Stengel	N	01/01/2000	DPW	01/0
BYWHOM	DPW	Donna P. Winders	N	01/01/2000	DPW	01/0

- Type **PLAYER** into the **Show only** field and press the **TAB** key to display only the **PLAYER** codes entered into the system.

Field	Code	Description	Inactive?	Cr_dt	Cr_by	Mod
PLAYER	DKZ	Derrick Zobert	N	01/01/2000	DPW	01/0
PLAYER	FDG	Fred Garvin	N	01/01/2000	DPW	01/0
PLAYER	JAS	John Schaub	N	01/01/2000	DPW	01/0
PLAYER	KJB	Kevin Bacon	N	07/22/2008		07/2
PLAYER	LOS	Larry Szabor	N	01/01/2000	DPW	01/0
PLAYER	SOS	Sally Schoenburg	N	01/01/2000	DPW	01/0

Below the table are controls: 'Show only: PLAYER' with a dropdown and a checkbox, 'Add', 'Edit', 'Delete', 'Print', 'Preview' buttons, 'Global Replace' button, 'Done' button, and a checked checkbox for 'Hide Inactive Codes'.

 **Tip:** Take note of the format of the existing player codes, particularly the number of characters. You will want to make your new codes match the existing ones.

3. Click the **Add** button. The Edit User-Defined Codes screen appears:

The 'Edit User-Defined Codes' window contains the following fields and controls:

- Code:** A text input field.
- Description:** A text input field.
- Field Name:** A dropdown menu currently showing 'PLAYER' and a checkbox.
- Turn off Caps:** A checkbox.
- Inactive:** A checkbox.
- Save** and **Done** buttons.
- Number Played:** A text input field.

4. Enter the code for the new player in the **Code** field. It is best to match the number of characters in the existing player codes, if any.
5. Enter the player name in the **Description** field.
6. Click the **Save** button. The fields will empty so that you can enter a new code.
7. Repeat steps 4-6 for any remaining codes you need to create.
8. Click the **Done** button to return to the Code Maintenance screen. Your new **PLAYER** codes will be displayed.
9. Click the Done button to close the Code Maintenance screen.

### ***Entering Pledges from Donors for Sponsored Events***

Once the player codes have been entered into the system, you are ready to enter the donor pledges for the event. This can be done before the event.

#### **► To enter a pledge for a sponsored event**

1. Start up a new pledge entry in the usual way. See “Adding Pledges” page 91 for details.
2. In the Pledge Entry screen, select the name of the player who will be participating in the event from the **Player** list.
3. Set the pledge per mile walked, hour danced, etc. in the **Pledge Per** \_\_\_ field.



**Note:** The **Player** and **Pledge Per** \_\_\_ fields are the ones you added to the Pledge Entry screen earlier. The Player field lists the players who you entered **PLAYER** codes for in the previous step.

4. Do not enter a **Total**, **Initial Payment** or **Billing Amount** for the pledge.
5. Click the **Done** button to finish creating the pledge.

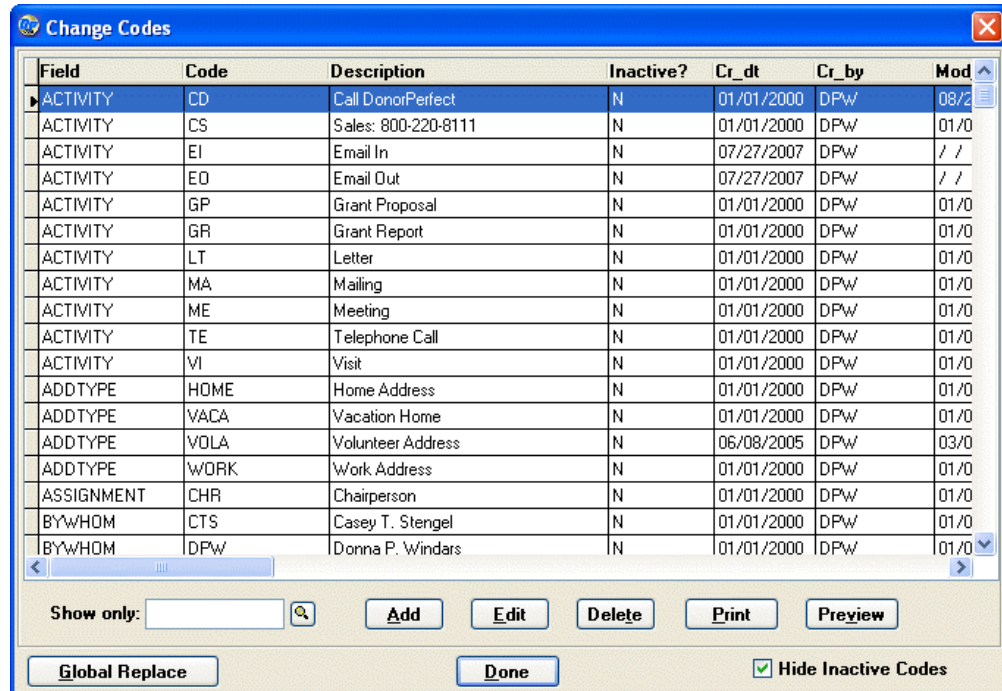
### ***Updating the Played Field for each Player Code after the Sponsored Event***

Once the event occurs, and you know how many units of work each player completed (how many miles they walked, etc.), you need to enter those numbers into the system so that the total amounts of the pledges can be calculated.

The number of work units completed is entered into the **Number Played** field for each **PLAYER** code in the Code Maintenance window.

#### **► To enter the number of work units into the Number Played field for each player**

1. From the main screen, click on the **Utilities** button and select **Code Maintenance**.



2. Type **PLAYER** into the **Show only** field and press the **TAB** key to display only the **PLAYER** codes entered into the system.
3. For each **PLAYER** code:
  - a. Select the code in the Code Maintenance screen list.
  - b. Click the **Edit** button. The Edit User-Defined Codes screen appears:



- c. Enter the number of work units that the player completed into the **Number Played** field.
  - d. Click the **OK** button.
4. Once all the players' work units are entered, click the **Done** button to close the Code Maintenance screen.

### **Computing Pledge Totals using the Update Sponsored Pledges Button**

Once you have entered player codes and pledges for the sponsored event, and updated the player codes with the number of work units completed, you need to calculate the final pledge totals for all of the event's pledges.

This is done using the Update Sponsored Pledges button that can be found in the **Report Options** area of the Sponsored Event reports.

The total amount for a pledge is simply the number of work units completed multiplied by the pledge per unit.

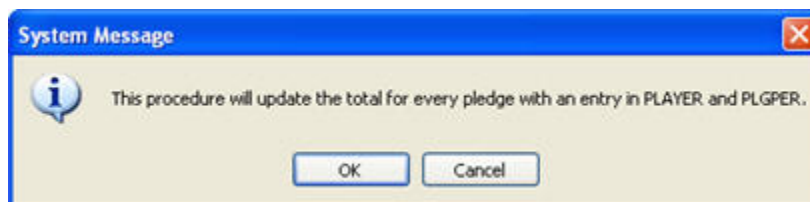
► **To compute the totals for sponsored event pledges using the Update Sponsored Pledges button**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under Report Category, select Sponsored Events.
3. Under Select Report Type, select either Constituent Report or Participant Report.

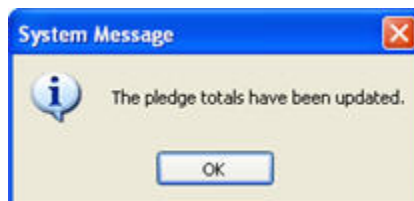


**Note:** You can select either report, the **Update Sponsored Pledges** button is on both report screens, and functions identically in either location.

4. Click the **Update Sponsored Pledges** button. A confirmation message appears:



5. Click the **OK** button to update the pledge totals. Once the update finishes, a second message appears:



6. Click the **OK** button to close the message screen.

## ***Running the Sponsored Event Reports***

Two reports are provided to enable you to monitor sponsored events:

- **Constituent Report** - This report shows how much each sponsor pledged to each participant in a sponsored event.
- **Participant Report** - This report shows how much each participant raised in donations for sponsored events.

For details on running these reports, see “Monitoring Event Status Using Event Reports” page 242.

## ***Sending Out Pledge Reminders for Sponsored Events***

Once you have updated the **# Played** fields for each player in the sponsored event, and have computed the pledge totals for your event's pledges, you are ready to send out pledge reminders to the sponsors.

Once pledge totals have been computed, sending out pledge reminders for a sponsored event works just like any other pledge reminder.

See “Creating Pledge Reminders” page 189 for details on sending out pledge reminders.

## ***Managing Auctions***

---

DonorPerfect has been able to support fundraising auctions for some time, but with the advent of the Event Management module, things have become a bit better organized.

The basic idea is that auction items are entered into the system as In-Kind gifts. Each item in the auction is also assigned an Item Number. The winning bids are also entered as gifts, referencing the same Item Numbers. The system can then generate reports that track item donations and winning bids.

The general work flow for supporting an auction in DonorPerfect 10 is as follows:

1. Add the auction as an event in the Event Management module.
2. Enter the items that are up for auction.
3. Print out bid sheets for each item before the event.
4. At the auction, record the bids for each item on the bid sheets.
5. After the event, enter the winning bids into the system.
6. Generate reports and mailings for the auction.

## ***Adding the Auction as an Event***

Before you enter auction items for an event, you must create the entry for the event itself.

The minimum that you need to do for an auction is to create the event itself: you do not need to fill out all the details with guest invitations and the like unless you want to.

For details on adding an event, see “Adding a New Event” on page 196.

## Entering Auction Items

The Auction Items screen allows you to enter items that are up for auction into the system, and record the winning bids for those items.

To access the Auction Items screen:

- From the Event Management module, click the **Manage Auction Items** link. Select the desired event from the **Event Name** list at the top of the screen.
- From the Event Details screen, click the **Auction Items** button.

### **Adding Auction Items**

#### ► To add an auction item

1. Select the **Auction Items** tab of the Auction Items screen.
2. Click the **Add Item** button. The Enter Auction Item screen opens:





The screenshot shows the 'Enter Auction Item' window with the following data entered:

- 1 Search:** Donor ID: [Empty]
- 2 Donor Information:** Donor ID: 16, Title: Mr. & Mrs., First Name: Roger, Last Name: Sandstone, Address: 2522 N. Adams Court, Postal Code: Philadelphia PA 19115-3309
- 3 Gift:** Event: Auction 2008, Date: 09/15/2008, Fair Market Value: 0.00, Gift Type: In Kind Gift, Category: [Empty], Item #: 12
- Item Description:** [Empty text area]
- Check #/Ref:** [Empty]
- Thank You #:** [Empty], **GL Code:** [Empty]

- b. To add a new individual donor to the system:
  - i. Click the **Add Ind.** button. The empty fields for the donor's information appears in the **Donor Information** area of the Enter Auction Item screen:

The screenshot shows the 'Enter Auction Item' window with the following data entered:

- 1 Search:** Donor ID: [Empty]
- 2 Donor Information:** Donor ID: 160, Title: [Empty], First Name: [Empty], Last Name: [Empty], Address: [Empty], Postal Code: [Empty]
- 3 Gift:** Event: Auction 2008, Date: 09/15/2008, Fair Market Value: 0.00, Gift Type: In Kind Gift, Category: [Empty], Item #: 12
- Item Description:** [Empty text area]
- Check #/Ref:** [Empty]
- Thank You #:** [Empty], **GL Code:** [Empty]

- ii. Fill out the **Donor Information** fields (see “Adding Individual Donor Records” page 53 for details).
- c. To add a new organization to the system and link the gift to it:
  - i. Click the **Add Org.** button. The empty fields for the organization's information appears in the **Donor Information** area of the Enter Auction Item screen:

**1 Search**

Donor ID:

Lookup Add Ind. Add Org. OK

**2 Donor Information**

Donor ID: 161

Org. Name:

Org. Prefix:

Prof. Title:

Contact:

Address:

Postal Code:

**3 Gift** Event: Auction 2008

Date: 09/15/2008

Fair Market Value: 0.00

Gift Type: In Kind Gift

Category:  Item #: 12

Item Description:

Check #/Ref:

Thank You #:  GL Code:

Clear Next Finished

Recently Viewed Constituents:  
 J161  
 Mr. & Mrs. Roger Sandstone J161

- ii. Fill out the **Donor Information** fields (see “Adding Organization Donor Records” page 57 for details).
4. Enter the details for the auction item. See “Adding Gifts” page 76 for details on individual fields.
5. When you’re finished entering the information for the auction item, click the **Next** button.

If you added a new individual or organization, and the information you entered **does not** closely match any existing records, a new donor record is created. If the information you entered **does** closely match one or more existing records, the **Duplicate Donor Check** screen appears. See “Checking for Duplicate Records” page 56 for details on this function.

A gift record is created for the auction item, and the Enter Auction Item screen resets to its original blank state so that you can enter another auction item.

6. To add additional auction items, repeat steps 3-5.
7. When finished adding auction items, click the Finished button to close the Enter Auction Item screen and return to the Auction Items screen.

### Editing Auction Items

#### ► To edit an auction item

1. Select the **Auction Items** tab of the Auction Items screen.
2. Select the entry for the auction item you want to edit.
3. Click the **Edit** button. The fields for the item will appear at the bottom of the screen:

**Auction Items**

Event Name: Auction 2008

Auction Items				Winning Bids		
Cat.	Item#	Item Description	FMV	Starting Bid	Donated By	Sold
	2	Bust of Shakespeare	\$250.00	\$100.00	Mr. & Mrs. Roger Sandstone	Y
	3	Big Clown Shoes	\$75.00	\$0.00	Comcast Cable	Y
	6	Crate of Canned Cheeseburgers	\$200.00	\$0.00	Dr. Clark Savage, Jr.	N
	8	Good Luck Cat Statue	\$100.00	\$10.00	Doctor John Smith	Y
	9	Polyester Sports Jacket	\$200.00	\$0.00	Mr. Fred Garvin	Y
	10	Animatronic Santa Claus	\$50.00	\$0.00	Genom Corporation North Americ	Y
	11	Gibson Les Paul Guitar	\$2,000.00	\$0.00	Ms. Joan Jett	Y

Total FMV: \$2,875.00

Winning Bid Edit Add Item Delete Item Done

Category: Item #: 8 Donor Name: Doctor John Smith

Fair Market Value: 100.00 Starting Bid: 10.00 Sub Solicitation:

Item Description: Good Luck Cat Statue

Save Cancel

4. Edit the values of the item fields. See “Adding Gifts” page 76 for details on fields.
5. When finished, click the **Save** button to save changes to the auction item, or click the **Cancel** button to abandon changes.

### Deleting Auction Items

#### ► To delete an auction item

1. Select the **Auction Items** tab of the Auction Items screen.
2. Select the entry for the auction item you want to edit.
3. Click the **Delete Item** button. A confirmation message will appear:

**Confirm Auction Item Deletion**

Are you sure you want to delete this auction item.

Yes No

4. Click the **Yes** button to delete the item, or click the **No** button to cancel deletion.

### Printing out Bid Sheets before an Auction

Before each auction event, you should print out multiple Bid Sheets for each auction item and bring them to the event. This will provide you with the necessary paperwork to track the bids and bidders and record the winning bid.

For details on printing out the Bid Sheets, see “Bid Sheets” page 253.

## Recording the Winning Bids for Auction Events

At the auction event, use the Bid Sheet reports that you printed out before the event to keep a record of the bidding for each item in the auction.

Write down the bidder name, phone number and amount for each bid.

Once the auction is over, use the bid sheets to enter the winning bids into your system.

## Entering the Winning Bids for Auction Events

Once the auction has been run and the winning bids for auction items have been recorded, you can enter the winning bids into your DonorPerfect system. Once a winning bid has been entered, it will be visible on the Winning Bids tab of the Auction Items screen.

► **To enter the winning bids for auction items:**

1. Select the **Auction Items** tab of the Auction Items screen.
2. Select the entry for the auction item.
3. Click the **Winning Bid** button. The Apply Winning Bid screen appears:

The screenshot shows a software window titled "Apply Winning Bid". It is divided into three main sections:

- 1 Search:** Contains a "Donor ID:" text input field, and four buttons: "Lookup", "Add Ind.", "Add Org.", and "OK".
- Recently Viewed Constituents:** A list showing "[161]" and "Mr. & Mrs. Roger Sandstone [16]".
- 2 Donor Information:** A large empty area for entering donor details.
- 3 Gift:** A large empty area for entering gift information.

A "Finished" button is located at the bottom right of the window.

4. Select the donor record of the constituent(s) who made the highest bid:
  - a. To select an existing donor record (one that has already been entered into the system):
    - i. Click the **Lookup** button. The **Enter Name to Look Up** screen appears.



**1 Search**  
 Donor ID:

**2 Donor Information**  
 Donor ID: 162  
 Title:   
 First Name:   
 Last Name:   
 Address:   
 Postal Code:

**3 Gift** Event: Auction 2008  
 Sub-Sol:   
 Date: 08/20/2008    
 Amount: 0.00 FMV: 200.00  
 Gift Type: In Kind Gift  
 Check #/Ref:   
 Thank You #:   GL Code:    
 Category:   Item #: 6  
 Item Description: Crate of Canned Cheeseburgers

- ii. Fill out the **Donor Information** fields (see “Adding Individual Donor Records” page 53 for details).
- c. To add a new organization to the system and link the gift to it:
  - i. Click the **Add Org.** button. The empty fields for the organization's information appears in the **Donor Information** area of the Apply Winning Bid screen:

**1 Search**  
 Donor ID:

**2 Donor Information**  
 Donor ID: 163  
 Org. Name:   
 Org. Prefix:   
 Prof. Title:   
 Contact:   
 Address:   
 Postal Code:

**3 Gift** Event: Auction 2008  
 Sub-Sol:   
 Date: 08/20/2008    
 Amount: 0.00 FMV: 200.00  
 Gift Type: In Kind Gift  
 Check #/Ref:   
 Thank You #:   GL Code:    
 Category:   Item #: 6  
 Item Description: Crate of Canned Cheeseburgers

- ii. Fill out the **Donor Information** fields (see “Adding Organization Donor Records” page 57 for details).

5. Enter the details for the auction item. See “Adding Gifts” page 76 for details on individual fields.
6. Click the Finished button to close the Apply Winning Bid screen and return to the Auction Items screen.

### Editing a Winning Bid

The **Winning Bids** tab of the Auction Items screen allows you to edit the entries for each winning bid in an auction. You can edit the fields for the item itself, but you cannot change the donor.

#### ► To edit an auction item

1. Select the **Winning Bids** tab of the Auction Items screen.
2. Select the entry for the auction item you want to edit.
3. Click the **Edit** button. The fields for the item will appear at the bottom of the screen:

Cat.	Item#	Item Description	Amount	FMV	Purchased By
	2	Bust of Shakespeare	\$300.00	\$250.00	Mr. Kevin Bacon
	3	Big Clown Shoes	\$100.00	\$75.00	Arlen Specter
	8	Good Luck Cat Statue	\$100.00	\$100.00	Mr. & Mrs. Roger Sandstone
	9	Polyester Sports Jacket	\$50.00	\$200.00	Mr. Tom Stortz
	10	Animatronic Santa Claus	\$100.00	\$50.00	Mr. Anthony Stark
	11	Gibson Les Paul Guitar	\$5,000.00	\$2,000.00	Stephen Ballmer

Total Amount: \$5,650.00

Category: Item #: Donor Name: Mr. & Mrs. Roger Sandstone

Fair Market Value: 100.00 Amount: 100.00 Sub Solicitation:

Item Description: Good Luck Cat Statue

Save Cancel

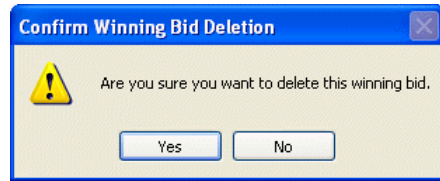
4. Edit the values of the item fields. See **Adding Gifts** for details on fields.
5. When finished, click the **Save** button to save changes to the bid, or click the **Cancel** button to abandon changes.

### Deleting a Winning Bid

#### ► To delete a winning bid

1. Select the **Winning Bids** tab of the Auction Items screen.
2. Select the entry for the winning bid you want to edit.
3. Click the **Delete Item** button. A confirmation message will appear:





4. Click the **Yes** button to delete the winning bid, or click the **No** button to cancel deletion.

## Generating Reports and Mailings for Auction Events

### ***Auction Reports***

DonorPerfect provides the following reports to aid you in managing your auctions:

- **Bid Sheets** - Print these out before the event to aid in recording the bids for each item. See “”Bid Sheets”” page 253 for details.
- **Item Report** - This report lists each item entered for selected events. See “Item Report” page 251 for details.
- **Purchaser Report** - This report lists the donors who made the winning bids for each item in the selected auctions. See “Purchaser Report” page 255 for details.

### ***Generating Mailings for Auctions***

In general, when outputting data files for mailings related to auctions, you will be outputting lists of gifts associated with the solicitation code for the auction.

You will want to use a selection filter to separate the gift records for auction item donations from the gift records for the winning bids.

For details on creating selection filters, see “Working with Selection Filters” page 118.

### ***Creating a Selection Filter for Auction Item Donation Records***

- ▶ **To create a selection filter to select the auction item donation records for an auction**
  1. Check **Set Selection Filter** in the Export Listing.
  2. Check **Build a Selection Filter**.
  3. For the first criteria, set **Table** to **Gifts**. Set **Solicitation Code** equal to the code for the auction event.
  4. Click the **AND** button.
  5. For the second criteria, set **Table** to **Gifts**. Set **Auction Item Number** to **Field is NOT blank**.
  6. Click the **AND** button.
  7. For the third criteria, set **Table** to **Gifts**. Set **Amount of Gift** equal to **0**.
  8. Click the **Finished** button.
  9. Click the **OK** button in the Selection Verification screen.

## Creating a Selection Filter for Winning Bid Records

- ▶ To create a selection filter to select the winning bids for an auction
  1. Check **Set Selection Filter** in the Export Listing.
  2. Check **Build a Selection Filter**.
  3. For the first criteria, set **Table** to **Gifts**. Set **Solicitation Code** equal to the code for the auction event.
  4. Click the **AND** button.
  5. For the second criteria, set **Table** to **Gifts**. Set **Auction Item Number** to **Field is NOT blank**.
  6. Click the **AND** button.
  7. For the third criteria, set **Table** to **Gifts**. Set **Amount of Gift** to greater than 0.
  8. Click the **Finished** button.
  9. Click the **OK** button in the Selection Verification screen.

## Monitoring Event Status Using Event Reports

The Event Reports screen allows you to access a number of reports that allow you to track the status of one or more events.

**Event Reports**

**1 Report Category**

- Tables/Teams
- General Analysis
- Sponsored Events
- Auction
- Special Event Reports

**2 Select Report Type**

- Guest Report
- Table/Team Report
- Attendee Name Tags

**Report Information**

Guest Report allows you to see information on the guest's seating assignments, sorted alphabetically by guest name.

**3 Set Report Options**

Set Selection Filter ...

All Events

**Event**

- Annual Conference 2008
- Banquet 2008

Enter a title for the report:

Print

Preview

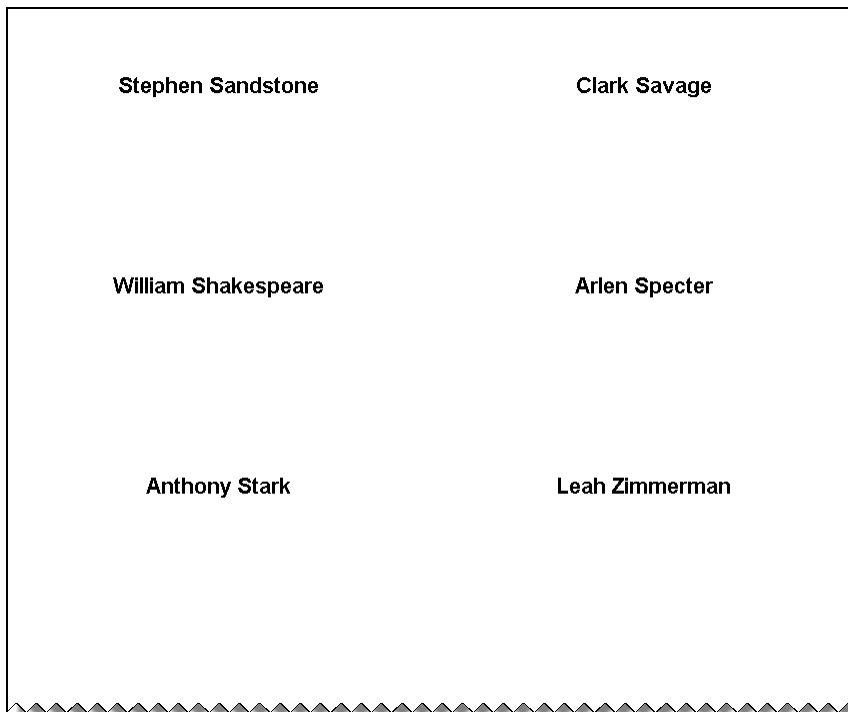
Cancel

The available event reports are:

- **Tables/Teams Reports**
  - Attendee Name Tags
  - Guest Report
  - Table/Team Report
- **General Analysis Reports**
  - Event Analysis Report
  - Expense Report
  - Historical Comparison Report
  - Invitation Aging Report
- **Sponsored Events Reports**
  - Constituent Report
  - Participant Report
- **Auction Reports**
  - Item Report
  - Purchaser Report
  - Bid Sheets
- **Special Event Reports**
  - Seating – by Name
  - Seating – by Seat/Table
  - Team Report – by Name
  - Team Report – by Team
  - Name Tags
  - Event Setup Report

## Tables/Teams Reports

### ***Attendee Name Tags Report***



The Attendee Name Tags Report allows you to print out name tags for the attendees at your event.

► **To run the Attendee Name Tags Report**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Tables/Teams**.
3. Under **Select Report Type**, select **Attendee Name Tags**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. To generate reports for all events in the system, check **All Events**. To run the report for selected events only, clear the **All Events** checkbox, and check the individual events below.
6. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
7. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
8. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Guest Report

06/19/2008		Your Organization Name Here		Page: 1
Event Name: Annual Conference 2008				
Guest	Table/Team	Guest of		
Guest 1 of Anthony Stark	Alpha Table	Anthony Stark		
Francis Bacon	Bravo Table	William Shakespeare		
Fred Garvin	Alpha Table			
Melinda Gates	Omega Table	William H Gates		
William H Gates	Omega Table			
Guest 1 of Leah Zimmerman	Bravo Table	Leah Zimmerman		
Viola Lesseps	Bravo Table	William Shakespeare		
Guest 1 of Roger Sandstone	Alpha Table	Roger Sandstone		
Guest 2 of Roger Sandstone	Alpha Table	Roger Sandstone		
Roger Sandstone	Alpha Table			
(C) Clark Savage	Alpha Table			
William Shakespeare	Bravo Table			
Arlen Specter	Omega Table			
Anthony Stark	Alpha Table			
Leah Zimmerman	Bravo Table			
<b>Guest Count:</b> 15				

The Guest Report lists all of the attendees for the event, sorted alphabetically by name. It also lists the table or team the attendee belongs to, if any, and if they are a guest, who they are a guest of. Team/Table captains are listed with a **(C)** next to their names.



**Note:** Guests and attendees who have not yet been assigned to a table or team will not appear on the Guest Report.

► **To run the Guest Report**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Tables/Teams**.
3. Under **Select Report Type**, select **Guest Report**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. To generate reports for all events in the system, check **All Events**. To run the report for selected events only, clear the **All Events** checkbox, and check the individual events below.
6. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
7. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
8. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Table/Team Report

06/20/2008	Your Organization Name Here Table/Team Report	Page: 1
<b>Event Name: Annual Conference 2008</b>		
<b>Table/Team: Alpha Table</b>	<b>Maximum: 8</b>	<b>Current: 7</b>
<b>Team Captain(s): Clark Savage</b>		
Guest 1 of Anthony Stark Fred Garvin Mary Sandstone Roger Sandstone Stephen Sandstone (C) Clark Savage Anthony Stark		
<hr/>		
<b>Table/Team: Bravo Table</b>	<b>Maximum: 8</b>	<b>Current: 5</b>
Francis Bacon Guest 1 of Leah Zimmerman Viola Lesseps William Shakespeare Leah Zimmerman		
<hr/>		

The Table/Team Report lists all of the attendees for the event, organized by table. It also lists the Team/Table captains, and the current and maximum number of people for each team/table.



**Note:** Guests and attendees who have not yet been assigned to a table or team will not appear

on the Table/Team Report.

► **To run the Table/Team Report**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Tables/Teams**.
3. Under **Select Report Type**, select **Table/Team Report**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. To generate reports for all events in the system, check **All Events**. To run the report for selected events only, clear the **All Events** checkbox, and check the individual events below.
6. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
7. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
8. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

## General Analysis Reports

### Event Analysis Report

06/20/2008		Your Organization Name Here				Page: 1	
<b>Event Analysis</b>							
<b>Event Details</b>							
Event Name: Annual Conference 2008				Goal: \$20,000.00			
Event Date: 08/15/2008				Total Income to Goal: \$1,600.00			
Location: Days Inn State College				% to Goal: 8.00%			
<b>Invitations</b>							
	No. Invited	No. Responses	Response Rate	Avg. Response Time	No. Attending		
	0	10	** *** **%	3.10	15		
<b>Financial</b>							
	No. Gifts	Gift Total	Avg. Gift	No. Pledges	Pledge Total	Avg. Pledge	Total Revenue
	4	\$500.00	\$125.00	2	\$1,100.00	\$550.00	\$1,600.00
<b>Expenses</b>							
	<u>Vendor</u>		<u>Type</u>	<u>Amount</u>	<u>Cost Per Attendee</u>		
	Days Inn Hotel		Location	\$5,000.00	\$333.33		
	Aramark		Catering	\$10,000.00	\$666.67		
			<b>Grand Total:</b>	\$15,000.00	\$1,000.00		
<b>Summary</b>							
	Revenue per Attendee: \$106.67						
	Cost per Attendee: \$1,000.00						
	Net Gain/Loss per Attendee: (\$893.33)						
	Total Revenue: \$1,600.00						
	Total Expenses: \$15,000.00						
	Overall Net Gain/Loss: (\$13,400.00)						

The Event Analysis Report is a one-page summary and analysis of the event. It provides you with a single-page snapshot of how the numbers for the event are looking at the current time.

► **To run the Event Analysis Report**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **General Analysis**.
3. Under **Select Report Type**, select **Event Analysis**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. To generate reports for all events in the system, check **All Events**. To run the report for selected events only, clear the **All Events** checkbox, and check the individual events below.
6. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
7. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
8. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Expense Report

09/15/2008		Your Organization Name Here			Page: 1
Expense Report					
Vendor	Event	Type	Status	Amount	
Days Inn Hotel	Annual Conference 2008	Location	Approved	\$5,000.00	
Aramark	Annual Conference 2008	Catering	Approved	\$10,000.00	
Victor DJ	Annual Conference 2008	Entertainment	Approved	\$300.00	
Guest Speaker Speaking Fee	Annual Conference 2008	Entertainment	Approved	\$1,000.00	
Guest Travel Expenses	Annual Conference 2008	Other	Approved	\$3,000.00	
				<b>Total:</b>	<b>\$19,300.00</b>

The Event Expense Report lists the expenses that have been entered for one or more events.

► **To run the Event Analysis Report**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under Report Category, select General Analysis.
3. Under Select Report Type, select Expense Report.
4. Check Set Selection Filter to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. To generate reports for all events in the system, check All Events. To run the report for selected events only, clear the All Events checkbox, and check the individual events.
6. Select one of the following Group By options to determine how the expenses will be organized in the report:

Option	Description
<b>Vendor Name</b>	The expenses will be grouped according to the vendor name listed. If the same vendor is listed for multiple events, their expenses for all of the events will be grouped together. This is useful when trying to summarize the expenses occurred for a vendor across multiple events.
<b>Event Name</b>	The expenses will be grouped by the event that they are associated with.
<b>Expense Type</b>	The expenses will be grouped by type across all selected events. For instance, all of the location expenses for all events will be grouped together.
<b>Status</b>	The expenses will be grouped by status across all selected events. The Approved expenses for all events will be in one group, and the Pending expenses for all events will be in another group.

- Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
- Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
- Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Historical Comparison

06/20/2008		Your Organization Name Here								Page: 1	
Historical Comparison											
Number Invited	Number Responses	Response Rate	Number Attending	Total Revenue	Total Expenses	Net Gain/Loss	Revenue per Attendee	Cost per Attendee	Goal	% to Goal	
Event Name: Annual Conference 2008											
0	10	**,**,***,***%	15	\$1,600.00	\$15,000.00	(\$13,400.00)	\$106.66	\$1,000.00	\$20,000.00	8.00%	
Event Name: Banquet 2006											
1,000	0	0.00%	93	\$51,500.00	\$1,300.00	\$50,200.00	\$553.76	\$13.97	\$10,000.00	515.00%	
Event Name: Banquet 2007											
1,200	0	0.00%	18	\$9,200.00	\$700.00	\$8,500.00	\$511.11	\$38.88	\$6,000.00	153.33%	
Event Name: Banquet 2008											
0	18	**,**,***,***%	18	\$8,700.00	\$0.00	\$8,700.00	\$483.33	\$0.00	\$10,000.00	87.00%	

The Historical Comparison Report allows you to compare the revenues of your current events with those of past events.

#### ► To run the Historical Comparison Report

- In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
- Under **Report Category**, select **General Analysis**.
- Under **Select Report Type**, select **Historical Comparison**.
- Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.



5. To generate reports for all events in the system, check **All Events**. To run the report for selected events only, clear the **All Events** checkbox, and check the individual events below.
6. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
7. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
8. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Invitation Aging Report

06/20/2008		Your Organization Name Here						Page: 1		
Invitation Aging Report										
Event Name	0 - 30 Days			31 - 60 Days			Over 60 Days			
	Responses	# of Gifts	Total \$	Responses	# of Gifts	Total \$	Responses	# of Gifts	Total \$	
Annual Conference 2008	10	6	\$1,600.00	0	0	\$0.00	0	0	\$0.00	
Banquet 2006	0	0	\$0.00	0	0	\$0.00	0	0	\$0.00	
Banquet 2007	0	0	\$0.00	0	0	\$0.00	0	0	\$0.00	
Banquet 2008	18	21	\$10,700.00	0	0	\$0.00	0	0	\$0.00	
	28	27	\$12,300.00	0	0	\$0.00	0	0	\$0.00	

Summary Totals:	Responses	# of Gifts	Total \$	Avg. Time (Days)
0 - 30 Days	28	27	\$12,300.00	1.42
31 - 60 Days	0	0	\$0.00	0.00
Over 60 Days	0	0	\$0.00	0.00
<b>Totals</b>	28	27	\$12,300.00	

The purpose of this report is to show customers how long it takes donors to respond to invitations. In terms of parameters, customers should have the option to select one or many events to compare. No start date or range is required since the system should simply be comparing the invitation date to the response date, calculating the range that the constituent fits in, and then grouping the results by event code.

#### ► To run the Invitation Aging Report

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **General Analysis**.
3. Under **Select Report Type**, select **Invitation Aging Report**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Set **Days in Aging Cycle** to the number of days you want each time period in the report to cover.

6. To generate reports for all events in the system, check **All Events**. To run the report for selected events only, clear the **All Events** checkbox, and check the individual events below.
7. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
8. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
9. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

## Sponsored Events Reports

### Constituent Report

Your Organization Name Here						
Sponsored Event Report - Sorted by Donor						
Name	Total Pledged	Plg per Unit	Balance Due	Player Code	Player Name	# Played
Mr. William H Gates	1,000.00	0.00	1,000.00			0
Genom Corporation North America	0.00	0.00	0.00			0
Genom Corporation North America	0.00	0.00	0.00			0
Genom Corporation North America	0.00	0.00	0.00			0
Mr. & Mrs. Roger Sandstone	0.00	0.00	0.00			0
Dr. Clark Savage, Jr.	0.00	0.00	0.00			0
Arlen Specter	100.00	0.00	0.00			0
Mr. Anthony Stark	0.00	0.00	0.00			0
Dr Leah Zimmerman, M.D.	0.00	0.00	0.00			0
Dr Leah Zimmerman, M.D.	0.00	0.00	0.00			0
<b>Total:</b>	<b>1,100.00</b>	<b>0.00</b>	<b>1,000.00</b>			

The Sponsored Event Report by Constituent shows how much each sponsor pledged to each participant in a sponsored event.

See “Managing Sponsored Events” page 222 for details on running sponsored events using DonorPerfect.



**Note:** Before you can run this report, you must have already set up the participants for the event.



**Important!** You should always update the pledge totals associated with sponsored events by clicking on the Update Sponsored Pledges button before running this report. This will ensure that the pledge totals are up to date. See “Computing Pledge Totals using the Update Sponsored Pledges Button” page 230 for details.

#### ► To run the Constituent Report

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.

2. Under **Report Category**, select **Sponsored Events**.
3. Under **Select Report Type**, select **Constituent Report**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
6. To narrow the scope of the report to a single sub-solicitation for an event, select the sub-solicitation from the **Sub-Solicitation** list. Otherwise, leave it set to **All Sub-Solicitations**.
7. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
8. If desired, you can enter additional selection filter criteria into the **Additional Criteria for Sponsor Report** field.
9. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
10. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

## Participant Report

Your Organization Name Here						
Sponsored Event Report - Sorted by Donor						
Name	Total Pledged	Pig per Unit	Balance Due	Player Code	Player Name	# Played
Mr. William H Gates	1,000.00	0.00	1,000.00			0
Genom Corporation North America	0.00	0.00	0.00			0
Genom Corporation North America	0.00	0.00	0.00			0
Genom Corporation North America	0.00	0.00	0.00			0
Mr. & Mrs. Roger Sandstone	0.00	0.00	0.00			0
Dr. Clark Savage, Jr.	0.00	0.00	0.00			0
Arlen Specter	100.00	0.00	0.00			0
Mr. Anthony Stark	0.00	0.00	0.00			0
Dr Leah Zimmerman, M.D.	0.00	0.00	0.00			0
Dr Leah Zimmerman, M.D.	0.00	0.00	0.00			0
<b>Total:</b>	<b>1,100.00</b>	<b>0.00</b>	<b>1,000.00</b>			

The Sponsored Event Report by Participant shows how much each participant raised for a specific event, such as a walk-a-thon or bowl-a-thon.

These reports are intended for marathon-type events, where a participant gets sponsors to donate based on the participant’s performance.

See “Managing Sponsored Events” page 222 for details on running sponsored events using DonorPerfect.



**Note:** Before you can run this report, you must have already set up the participants for the event.



**Important!** You should always update the pledge totals associated with sponsored events by clicking on the Update Sponsored Pledges button before running this report. This will ensure that the pledge totals are up to date. See “Computing Pledge Totals using the Update Sponsored Pledges Button” page 230 for details.

► **To run the Participant Report:**

- 1.** In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
- 2.** Under **Report Category**, select **Sponsored Events**.
- 3.** Under **Select Report Type**, select **Participant Report**.
- 4.** Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
- 5.** Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
- 6.** To narrow the scope of the report to a single sub-solicitation for an event, select the sub-solicitation from the **Sub-Solicitation** list. Otherwise, leave it set to **All Sub-Solicitations**.
- 7.** Select the **Detail** option to show the donations raised from each donor by each fundraiser, along with a total for each fundraiser. Select **Summary** to only display the total for each fundraiser.
- 8.** Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
- 9.** If desired, you can enter additional selection filter criteria into the **Additional Criteria for Sponsor Report** field.
- 10.** Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
- 11.** Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

## Auction Reports

### Bid Sheets

Name	Phone #	Amount Bid

The Bid Sheet (used for silent auctions) prints one item per page, with a grid below for the donors to enter their name, phone # and price. This report assumes that the entire description of each item has been entered in the GNARR field.

#### ► To run the Bid Sheet Report

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Auction**.
3. Under **Select Report Type**, select **Bid Sheets**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
6. If desired, specify an item category code in the **Category** field, or click the magnifying glass icon (🔍) to select a category. If a category code is specified, only items from that category will appear in the report.
7. If desired, specify an auction item number in the **Item #** field to generate a bid sheet for that item only.
8. Enter the starting and ending dates of the date range for the report in the **Donations From** and **Through** fields. Items that fall outside of this date range will not appear in the report.
9. If desired, enter keywords in the **Item Description Contains** field. Only items whose descriptions contain the specified words will appear in the report.

10. Select the field(s) that you want to use to sort the report records from the **Sort Order** list.
11. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
12. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
13. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Item Report

09/15/2008		Your Organization Name Here				Page: 1
Auction Item Report						
Category	Item #	Description	Fair Market Value	Starting Bid	Date	Donated By
Event: Auction 2008						
	2	Bust of Shakespeare	\$250.00	\$100.00	08/19/2008	Mr. & Mrs. Roger Sandstone
	3	Big Clown Shoes	\$75.00	\$0.00	08/20/2008	Comcast Cable
	5	Good Luck Cat Statue	\$0.00	\$0.00	08/20/2008	Doctor John Smith
	6	Crate of Canned Cheeseburgers	\$200.00	\$0.00	08/20/2008	Dr. Clark Savage, Jr.
	8	Good Luck Cat Statue	\$100.00	\$10.00	08/20/2008	Doctor John Smith
	9	Polyester Sports Jacket	\$200.00	\$0.00	08/20/2008	Mr. Fred Garvin
	10	Animatronic Santa Claus	\$50.00	\$0.00	08/20/2008	Genom Corporation North America
	11	Gibson Les Paul Guitar	\$2,000.00	\$0.00	08/20/2008	Ms. Joan Jett
<b>Total:</b>			<b>\$2,875.00</b>			

The Item Report lists the items that were donated to an auction.

#### ► To run the Item Report

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Auction**.
3. Under **Select Report Type**, select **Item Report**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
6. If desired, specify an item category code in the **Category** field, or click the magnifying glass icon (🔍) to select a category. If a category code is specified, only items from that category will appear in the report.
7. If desired, specify an auction item number in the **Item #** field to generate a bid sheet for that item only.
8. Enter the starting and ending dates of the date range for the report in the **Donations From** and **Through** fields. Items that fall outside of this date range will not appear in the report.
9. If desired, enter keywords in the **Item Description Contains** field. Only items whose descriptions contain the specified words will appear in the report.

10. Select the field(s) that you want to use to sort the report records from the **Sort Order** list.
11. Select the **Detail** option to list each item for each auction, or select **Summary** to display only the total **Fair Market Value** for all items.
12. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
13. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
14. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Purchaser Report

09/15/2008		Your Organization Name Here				Page: 1
Auction Purchaser Report						
Purchased By	Date	Amount	Fair Market Value	Category	Item #	Description
<b>Event: Auction 2008</b>						
Mr. Kevin Bacon	08/19/2008	\$300.00	\$250.00		2	Bust of Shakespeare
Arlen Specter	08/20/2008	\$100.00	\$75.00		3	Big Clown Shoes
Mr. & Mrs. Roger Sandstone	08/20/2008	\$100.00	\$100.00		8	Good Luck Cat Statue
Mr. Tom Stortz	08/20/2008	\$50.00	\$200.00		9	Polyester Sports Jacket
Mr. Anthony Stark	08/20/2008	\$100.00	\$50.00		10	Animaltronic Santa Claus
Stephen Ballmer	08/20/2008	\$5,000.00	\$2,000.00		11	Gibson Les Paul Guitar
<b>Totals:</b>		<b>\$5,850.00</b>	<b>\$2,875.00</b>			

The Auction Report by Purchaser lists auction items bought by each purchaser.

#### ► To run the Purchaser Report

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Auction**.
3. Under **Select Report Type**, select **Purchaser Report**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
6. If desired, specify an item category code in the **Category** field, or click the magnifying glass icon (🔍) to select a category. If a category code is specified, only items from that category will appear in the report.
7. If desired, specify an auction item number in the **Item #** field to generate a bid sheet for that item only.
8. Enter the starting and ending dates of the date range for the report in the **Donations From** and **Through** fields. Items that fall outside of this date range will not appear in the report.





2. Under **Report Category**, select **Special Event Reports**.
3. Under **Select Report Type**, select **Auction - Bid Sheets**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
6. To narrow the scope of the report to a single sub-solicitation for an event, select the sub-solicitation from the **Sub-Solicitation** list. Otherwise, leave it set to **All Sub-Solicitations**.
7. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
8. If desired, you can enter additional selection filter criteria into the **Additional Criteria for Auction** field.
9. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
10. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Auction Report by Item

Your Organization Name Here Auction Report - by Item		
Donor	Value	Item Description
Mr. Kevin Bacon	250.00	Bust of Shakespeare
Stephen Ballmer	2000.00	Gibson Les Paul Guitar
Mr. & Mrs. Roger Sandstone	100.00	Good Luck Cat Statue
Arlen Specter	75.00	Big Clown Shoes
Mr. Anthony Stark	50.00	Animatronic Santa Claus
Mr. Tom Stortz	200.00	Polyester Sports Jacket
<b>Grand Total Value:</b>		2675.00

The Auction Report by Item is an older version of the Item Report. It lists auction items donated and bought.

It is included for the convenience of existing users who take advantage of its unique features. It can still be used with auctions entered through the Event Management module, as well as with existing auctions.

#### ► To run the Auction Report by Item

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.

2. Under **Report Category**, select **Special Event Reports**.
3. Under **Select Report Type**, select **Auction – Item Report**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
6. To narrow the scope of the report to a single sub-solicitation for an event, select the sub-solicitation from the **Sub-Solicitation** list. Otherwise, leave it set to **All Sub-Solicitations**.
7. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
8. If desired, you can enter additional selection filter criteria into the **Additional Criteria for Auction** field.
9. Enter the field that you want to use to sort the Auction Report in the **Sort Field for Auction Report** field. If this field is empty, the report is sorted by donor name.
10. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
11. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Auction Report by Purchaser

Your Organization Name Here Auction Report - by Purchaser		
Name	Value	Purchase Price
Mr & Mrs George Judson Water Color by Renee	50.00	0.00
Adams McKinley Corporation Two Tickets Eagles Opening Game - Includes Parking Pass	175.00	0.00
Mr. & Mrs. Edmund Soffer Basket of Assorted Wines & Goodies	100.00	0.00
Mr. Ronald Solakian Antique Stained Glass Hanging Lamp	150.00	0.00
The Shell Oil Company 1968 Red Vw Bug	1250.00	0.00

The Auction Report by Item is an older version of the Purchaser Report. It lists auction items donated and bought.

It is included for the convenience of existing users who take advantage of its unique features. It can still be used with auctions entered through the Event Management module, as well as with existing auctions.

► **To run the Auction Report by Purchaser**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Special Event Reports**.
3. Under **Select Report Type**, select **Auction - Purchaser Report**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
6. To narrow the scope of the report to a single sub-solicitation for an event, select the sub-solicitation from the **Sub-Solicitation** list. Otherwise, leave it set to **All Sub-Solicitations**.
7. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
8. If desired, you can enter additional selection filter criteria into the **Additional Criteria for Auction** field.
9. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
10. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.



**Note:** To run the Auction Report by Purchaser with auctions created before the existence of the Event Management module, the purchased item must be tied to the description and value of the item. You can do this one of two ways:

- **Use Item #:** assign each item a number (gift field ITEMNUM), and enter the number in both the item donor's gift and purchaser's gifts. In this case, you only need to enter the value and description of the item in the donor's record and not the purchaser's record.
- **Enter Value of Item in Purchaser's Record:** if you do not use the item number, you need to enter the value and description of the item in both the donor's record and the purchaser's record.

### **Event Setup**

The Event Setup screen is not a report at all, though it can be found among the Special Event reports. It doesn't produce any kind of on-screen or printed output.

Rather, it provides a method for assigning guests at an event to teams and/or seats.

► **To assign guests to seats or teams using the Event Setup screen**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Special Event Reports**.
3. Under **Select Report Type**, select **Event Setup**.
4. Check **Set Selection Filter** to set a selection filter. This will allow you to confine your work to a subset of the guests for an event. See “Working with Selection Filters” page 118 for details.
5. Select the event you want to work with from the **Event** list. To work with guests for all events in the system, select **All Events**.
6. To narrow the scope of your work to a single sub-solicitation for an event, select the sub-solicitation from the **Sub-Solicitation** list. Otherwise, leave it set to **All Sub-Solicitations**.
7. The **Fields to show during Seat Assignment** field determines the fields that are displayed in the Seating Assignments grid.
8. The **Fields to show during Team Assignment** field determines the fields that are displayed in the Team Assignments grid.
9. To assign seat numbers to guests:
  - a. Click the **Assign Seating** button. The Seating Assignments screen will open:

Seat	Lastname	Fname	Elnname	Elnname	Date
	Jett	Joan			06/19/2008
	McClarkin	John D.			06/19/2008
	Jett	Joan			06/20/2008
	Judson	George			06/20/2008
	Barkley	Jan			06/20/2008
	Dotaak	Jacob			06/20/2008
	Tennivve	Jeanella			06/20/2008
	Johnson	Calvin			06/20/2008
	Sevenson	Richard			06/20/2008
	Sandstone	Roger			06/20/2008
	Schikan	Ronald			06/20/2008
	Soffer	Edmund			06/20/2008
	Takunston	Tim			06/20/2008
	Hobart	Edward			06/20/2008
	Snoyer	Paul			06/20/2008
	Stalk	Kelly			06/20/2008
	Steen	Steve			06/20/2008
	Stephenson	Don			06/20/2008
	Rodes	Alvin			06/20/2008
	Judson	George			06/27/2008
	Johnson	Clara			06/24/2008

- b. Enter a number in the **Seat** column of the grid to assign a seat to a guest.
  - c. When finished entering seat numbers, click the **ESC** key on your keyboard, or click the close (**X**) button in the upper right corner of the Seating Assignments window to close the window and return to the Event Setup screen.
10. To assign guests to teams:
  - a. Click the **Assign Teams** button. The Team Assignments screen will open:

Gteam	Lname	Fname	Gname	Sname
1	Stevenson	Richard		EQ00
1	Sandstone	Roger		EQ00
1	Sokaliam	Ronald		EQ00
1	Sofler	Edmund		EQ00
1	Talkington	Tim		EQ00
1	Hobart	Edward		EQ00
1	Seayer	Paul		EQ00
1	Shark	Kelly		EQ00
1	Stam	Steve		EQ00
1	Stephenson	Don		EQ00
1	Rades	Alvin		EQ00
1	Judson	George		EQ00
1	Johnson	Calvin		EQ00
2	Jett	Joan		EQ00
2	McClurkin	John D.		EQ00
2	Jett	Joan		EQ00
2	Judson	George		EQ00
3	Barkley	Jim		EQ00
3	Dotsaur	Jacob		EQ00
3	Tenavne	Jeanella		EQ00
3	Johnson	Calvin		EQ00

- b. Enter a number in the **Gteam** column of the grid to assign a team number to a guest.
- c. When finished entering team numbers, click the **ESC** key on your keyboard, or click the close (**X**) button in the upper right corner of the Team Assignments window to close the window and return to the Event Setup screen.

11. Click the **Cancel** button to exit the Event Setup screen.

### Name Tags

Mr. Jim Barkley, Jr.	Mr. Jacob Dotsaur
Mr. & Mrs. Edward Hobart	Ms. Joan Jett
Ms. Joan Jett	Mr. & Mrs. Calvin Johnson
Mr. & Mrs. Calvin Johnson	Mr & Mrs George Judson
Mr & Mrs George Judson	Mr. John D. McClurkin

The Name Tags report helps you print up sheets of name tags for attendees of an event.

► **To run the Name Tags report**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Special Event Reports**.
3. Under **Select Report Type**, select **Name Tags**.

4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
6. To narrow the scope of the report to a single sub-solicitation for an event, select the sub-solicitation from the **Sub-Solicitation** list. Otherwise, leave it set to **All Sub-Solicitations**.
7. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
8. If desired, you can enter additional selection filter criteria into the **Additional Criteria for Seating Report & Name Tags** field.
9. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
10. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Seating Report – Sorted by Name

Your Organization Name Here			
Seating Report - Sorted by Name			
Name	Seat	Seat With	\$ Owed
Mr. Kevin Bacon			
Stephen Ballmer			
Mr. Jim Barkley, Jr.	01		
Mr. Jacob Dotsaur			
Mr. Fred Garvin	02		
Melinda Gates			
Mr. William H Gates			
Ms. Joan Jett	01		
Ms. Joan Jett			
Mr. & Mrs. Calvin Johnson			
Mr & Mrs George Judson	01		
Mr. Brian Mann	01		
Mr. & Mrs. Alvin Relles	04		
Mr. & Mrs. Roger Sandstone	01		
Dr. Clark Savage			
Mr. Richard Schwalm	02		
Mr. Richard Seversen, III	02		
The Shell Oil Company	03		
Mr. & Mrs. Paul Smoyer			
Mr. Anthony Stark			
Mr. Floyd Taggert			

The Seating Report by Name lists the name and seat assignment of guests for an event, sorted alphabetically by name.

#### ► To run the Seating Report Sorted by Name

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.

2. Under **Report Category**, select **Special Event Reports**.
3. Under **Select Report Type**, select **Seating – by Name**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Set **Event** to the name of the event you want to generate a report for. To generate the report for all events, select **All Events**.
6. Optionally, you can select a **Sub-Solicitation**.
7. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
8. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
9. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Seating – by Seat/Table

Your Organization Name Here Table Seating - Sorted by Seat			
Name	Seat With	# Attending	\$ Owed
<b>Table #</b>			
Mr. Kevin Bacon		0	
Stephen Ballmer		0	
Mr. Jacob Dotsaur		0	
Melinda Gates		0	
Mr. William H Gates		0	
Ms. Joan Jett		0	
Mr. & Mrs. Calvin Johnson		0	
Dr. Clark Savage		0	
Mr. & Mrs. Paul Smoyer		0	
Mr. Anthony Stark		0	
Mr. Floyd Taggart		0	
<b>Count for Table #</b> :		<b>0</b>	
<b>Table # 01</b>			
Mr. Jim Barkley, Jr.		1	
Ms. Joan Jett		1	
Mr & Mrs George Judson		2	
Mr. Brian Mann		1	
Mr. & Mrs. Roger Sandstone		2	
<b>Count for Table #01</b> :		<b>7</b>	
<b>Table # 02</b>			
Mr. Fred Garvin		1	
Mr. Richard Schwalm		1	
Mr. Richard Seversen, III		2	
<b>Count for Table #02</b> :		<b>4</b>	

The Seating Report by Name lists the name of each donor sitting at each table. It includes table counts for each table.

► **To run the Seating Report Sorted by Table**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Special Event Reports**.
3. Under **Select Report Type**, select **Seating – by Seat/Table**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Set **Event** to the name of the event you want to generate a report for. To generate the report for all events, select **All Events**.
6. Optionally, you can select a **Sub-Solicitation**.
7. Select the **Detail** option to list each person seated at a table, or select **Summary** to display only the totals for each table.
8. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
9. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
10. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

**Team Report – by Name**

Your Organization Name Here Golf Report - Sorted by Name			
Name	Team	Handicap	Play With
Jon Biedermann	DP	3	SofterWare, Inc.
Mr. Richard Seversen, III	DP	6	

The Team Report by Name lists the attendee names and team assignments for events, such as golf tournaments, that have teams. It is sorted alphabetically by name.

► **To run the Team Report by Name**

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Special Event Reports**.
3. Under **Select Report Type**, select **Team Report by Name**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.



5. Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
6. To narrow the scope of the report to a single sub-solicitation for an event, select the sub-solicitation from the **Sub-Solicitation** list. Otherwise, leave it set to **All Sub-Solicitations**.
7. Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
8. If desired, you can enter additional selection filter criteria into the **Additional Criteria for Team Report** field.
9. Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
10. Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

### Team Report – by Team

Golf Report - Sorted by Team			
Name		Handicap	Play With
Team # DPCO	DonorPerfect Team		
Jon Biedermann		3.0	SofterWare, Inc.
Mr. Richard Severson, III		6.0	
Count for Team # DPCO : 2		<u>4.5</u>	

The Team Report by Team lists the names of each person on each team. It also calculates an average handicap per team.

#### ► To run the Team Report by Team

1. In the Event Management Module, click on the **Event Reports** link. The Event Reports screen opens.
2. Under **Report Category**, select **Special Event Reports**.
3. Under **Select Report Type**, select **Team Report by Team**.
4. Check **Set Selection Filter** to set a selection filter for the report. See “Working with Selection Filters” page 118 for details.
5. Select the event you want to run the report on from the **Event** list. To generate reports for all events in the system, select **All Events**.
6. To narrow the scope of the report to a single sub-solicitation for an event, select the sub-solicitation from the **Sub-Solicitation** list. Otherwise, leave it set to **All Sub-Solicitations**.

- 7.** Select the **Detail** option to list details for each attendee on each team, or select **Summary** to display only the total attendees on each team.
- 8.** Enter an optional title for the report in the **Enter a title for the report** field. This heading will appear in the title area of the report, under the report name.
- 9.** If desired, you can enter additional selection filter criteria into the **Additional Criteria for Team Report** field.
- 10.** Click the **Preview** button to open the report in Preview mode. See “Previewing a Report” in the *DonorPerfect Reports Guide* for details on previewing reports.
- 11.** Click the **Print** button to send the report to a printer. See “Printing a Report” in the *DonorPerfect Reports Guide* for details on printing reports.

## Customizing Event Entry Screens

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The Modify Event Entry Screens link allows you to customize the event entry screens.

This screen functions identically to the standard screen for modifying DonorPerfect data entry screens.

See “Customizing Data Entry Screens and Tables” in the *DonorPerfect Administrator’s Guide* for details on modifying screens.

# 10. Using Additional DonorPerfect Modules

## Overview

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You have the option to purchase several additional modules to help you manage your fund-raising program. The following modules are available:

- “Accounting Interface Module”—see page 268
- “Constant Contact Module”—see page 269
- “Using the Event Management Modules—see page 195
- “Gift Scanning Module”—see page 271
- “Import Module”—see page 272

## “Import Outlook Email Module

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DonorPerfect allows you to import emails from Microsoft Outlook and create contact records based on them.

This process can be set up to run automatically, or the Import Outlook Email module allows you to trigger the process manually.

See “Integrating Contact Information with Outlook” page 115 for details on this feature.

- “Insta-Charge Module”—see page 273
- “Online Donation Module (Donate.net)”—see page 274
- “WealthEngine Module”—see page 275
- “WebLink Module”—see page 276

This section details the benefits and features of each of the additional modules. When you purchase one of these modules, you’ll receive a separate manual that details how to use the module.



**Note:** For more information on purchasing these modules, contact your Regional Account Representative.

## **Accounting Interface Module**

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DonorPerfect offers an interface to the most popular nonprofit accounting systems through its Accounting Interface Module. This interface allows all your gift transactions to be easily summarized by your Chart of Accounts categories and posted automatically to your existing General Ledger system.

### **Accounting System**

You can interface with the following accounting programs\*:

- MIP
- Peachtree
- QuickBooks

### **Features**

The following features are available with the Accounting Interface Module:

- Saves time and reduce errors by eliminating the need to enter data twice
- Posts DonorPerfect data into the corresponding fields of your accounting package
- Identifies debit and credit accounts
- Provides full journal entries
- Allows you to choose a summary or detailed information transfer
- Allows you to utilize user-defined codes

## **Constant Contact Module**

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We've partnered with Constant Contact® to provide an easy, affordable way to expand your e-mail database of website visitors and donors. Use this service to create and send professional HTML e-mail newsletters, solicitations, or constituent alerts—and to measure the success of your campaigns.

### **Benefits**

- Improve the professionalism of your communications without a graphic artist
- No technical expertise required
- Better information on campaign results (including link tracking)
- Affordable rates start as low as \$10/month

### **Features**

- Customizable visitor website signup form
- Easily import names and e-mail addresses from DonorPerfect (or any file)
- Over 50 professional templates available
- Hosts and manages your e-mail database (including un-subscribes and bounces)
- Automatically formats for HTML and Text
- Instant reporting on opens, bounce-backs and other critical measures

## EZ-EFT Module/Pre-Authorized Payments

Would you like to reduce your fund-raising costs, increase the lifetime value of your donors, while making it as easy as possible for your donors to give on a regular basis? It may seem too good to be true, but by creating a successful pre-authorized gift program, you really can achieve all these benefits for your organization. Many DonorPerfect clients have done so, including one that is processing thousands of pre-authorized donations each month, averaging \$30,000-\$40,000 in gifts.

DonorPerfect users can collect one-time or on-going donations by direct electronic transfer with our EZ-EFT (Electronic Funds Transfer) Direct Giving module. This unique module allows your donors to pre-authorize the automatic payment of pledges by their bank or credit cards. DonorPerfect stores the needed account information and creates, posts, and transmits donations electronically to your account. The transfers appear on your donor's bank or credit card statements. This approach allows nonprofits of any size to take advantage of the same technology used by large corporations.

### Benefits

The Pre-Authorized Payments/EZ-EFT Module gives you the following benefits:

- **Less Administrative Time and Cost:** EZ-EFT will automatically collect and record gifts, and adjust pledge balances, saving posting time and cost. By eliminating the high cost pledge collection, you'll net more funds for your organization.
- **Automatic Fulfillment and Reliable Cash Flow:** Once donors sign-up for Direct Giving, pledge collection is automatic. This means all pledges are paid, and your cash flow will be improved and predictable. Instead of spending your valuable time sending pledge reminders, send your donor a letter of appreciation!
- **Encourages Larger Gifts and Annual Renewals:** By allowing donors to spread their contributions over the year, it is easier to generate larger pledges. And once a donor makes an EZ-EFT Direct Gift, you can count on increased annual renewals and giving levels.
- **Enhanced Convenience for Donors:** EZ-EFT is simple for your donors. They won't have to remember to write checks or renew their pledges, making their busy lives easier.
- **Better Security and Control of Funds:** No more worrying about lost checks, mishandled funds, or deposits not being made in a timely fashion.



**Note:** Want to learn more about pre-authorized giving? Ask your account manager for our free white paper: "Creating a Successful Preauthorized Giving Program."

## **Gift Scanning Module**

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The Gift Scanning Module allows you to use a hand-held OCR scanner to scan in donations from a remittance card instead of typing them in, resulting in speedy, accurate data entry.

This module works with many brands of scanner, but we recommend the 833 Wand Scanner from CAERE Corporation. You can purchase this particular scanner through DonorPerfect or through a local computer supplier. The scanner attaches to your computer's keyboard and reads in the donor ID # and solicitation code printed in barcode format on your reply pieces.

### **Benefits**

The Gift Scanning Module gives you the following benefits:

- Saves Time
- Reduces Chance of Error
- Allows quick conversion of prospect files into active donors
- No custom programming required

### **Features**

The Gift Scanning Module offers you the following features:

- Donations entered are balanced to a bank deposit. An audit trail is also established, linking donors to each gift, as well as tracking who entered the data.
- Donations can be downloaded from a bank or cash management firm.
- High-level fund-raising reports can be produced for each batch that is posted. This allows you to evaluate the net income performance at any time during the campaign.
- Donors who respond to an outside prospect mailing can automatically be added to the DonorPerfect table once a contribution is made.
- A thank-you letter can be assigned to the donor, based on a criteria table.

## Import Module

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The Import Module makes it easy to import new records or update existing records. With this module, you can import and update:

- Names and mailing addresses
- Phone numbers and email addresses
- Gifts and Codes
- Pledges, including pledge payments

## Benefits

The Import Module gives you the following benefits:

- Eliminates data entry time
- Makes it easy to enhance the quality of your data using external sources
- Facilitates integration of DonorPerfect with other sources

## Features

The Import Module offers you the following features:

- Advanced logic helps match data automatically between the import file and DonorPerfect
- Multiple ways to find and match records
- Save & reuse (multiple) import settings (profiles)
- Option to force pledge amounts protects against lost revenue
- Links pledges and gifts automatically
- Import multiple gifts for the same donor
- Preview data during import
- Automatic field analysis checks for mismatched field types or lengths, as well as missing required data
- Fix-on-the-fly allows you correct data without leaving import
- Import summary shows number of records processed, added, updated or bypassed
- Safeguards ensure records are added correctly before import



## **Import Outlook Email Module**

---

DonorPerfect allows you to import emails from Microsoft Outlook and create contact records based on them.

This process can be set up to run automatically, or the Import Outlook Email module allows you to trigger the process manually.

See “Integrating Contact Information with Outlook” page 115 for details on this feature.

## **Insta-Charge Module**

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Insta-Charge provides fully integrated credit card processing for one-time donations directly from within DonorPerfect Online and DonorPerfect Visual Edition. Just click on the credit card icon when entering a gift and fill in the donor’s credit card information. Insta-Charge validates the card information and authorizes the transaction in real time. The funds are then automatically sent to your designated bank account – normally within 24 hours! No need for a credit card terminal or double entry of data.

### **Benefits**

The Insta-Charge Module gives you the following benefits:

- Less data entry since donor information is automatically filled in and credit card payment data is included in gift history.
- Immediate validation of card data allows any issues (declines, etc.) to be resolved quickly and immediately.
- Integrated process eliminates challenges of reconciling credit card statements with donation records.
- Secure web-based process protects confidential donor data.

## **Online Donation Module (Donate.net)**

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The Online Import Module (Donate.net) allows your organization to add a secure online giving link to your existing website with virtually no effort or expense. This service handles all the processing and allows you to offer flexible giving levels, honorariums, memberships, special event tickets, or fund-raising items. You can then quickly and easily download your transactions and import them into your DonorPerfect system.

You can use this module to process the following types of gifts:

- Donations
- Honorariums
- Special event tickets
- Memberships
- Fund-raising item sales

### **Features**

The Online Donation Module offers you the following features:

- Instantly offers a new cost-effective way to work with constituents
- Secures credit card processing protects donor confidentiality
- Integrates with DonorPerfect so no data re-entry is necessary
- Automated e-mail confirmation for donors
- No high cost of development and maintenance
- Flexible design allows handling of most types of transactions
- Does not require complex paperwork or long wait for online merchant account.

## WealthEngine Module

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Identifying potential major donors and targeting annual or capital campaigns is a snap, thanks to DonorPerfect's integration partnership with WealthEngine. With this service, you can screen your donor database using WealthEngine's sophisticated prospect research system. The rating data on matching donors is easily imported into DonorPerfect, where it can be used for targeting campaigns and solicitations.

### Benefits

- Screened or on-demand data on donor, prospect, company, or foundation wealth
- More than 25 top sources of public data—including real estate, philanthropy, stock ownership and hard assets
- Unique rating system to assist with targeting and segmenting for major gifts, planned giving, and annual fund campaigns
- Web-based research center gives you the latest information on a donor, prospect, company or foundation
- Quick links to your VIPs and adjustable giving capacity rating and scoring
- Integration with DonorPerfect brings data directly into the appropriate fields

### Available Services

Screen all or just a segment of your DonorPerfect database against Wealth Engine's data services. This data analysis applies statistical models to calculate ratings and scoring for each matched record. Summary information can be easily imported back into your DonorPerfect database for further reporting and filtering. The result is clear, comprehensive information that you can take from desktop to donor meeting.

#### **WebService Research Center**

A web-based research tool with immediate results on individuals, nonprofits, foundations and companies. With each look-up, all the source databases are scanned for the latest information and then compiled. You access the most current data on valuable hard asset information like real estate, pension and income, as well as philanthropic and biographical data.

#### **Additional WebService Options**

**WebConnect**—This provides a Wealth Engine lookup button directly from within DonorPerfect. This one-click access to the WebService Research Center puts up-to-the-minute detailed wealth information at your fingertips.

**Pinpoint**—This add-on service provides proprietary stock information and a news alert service.

## **WebLink Module**

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WebLink allows your organization to securely and efficiently offer online forms for a variety of purposes. WebLink is an Internet-based application that provides highly customizable forms as links from your existing website. The service can collect data and, if you desire, process payments. You can review the signups and then quickly and easily import them into your DonorPerfect system.

### **Features**

- Unique flexible design allows for completely customizable forms
- Integrates with your existing website – just add links!
- Flexible “shopping cart” for selection of giving options, premiums, special events, etc.
- Optional Secure 128-bit encryption credit card processing
- Automatic data validation
- E-mail confirmations
- Online waiver form acceptance
- Download directly into DonorPerfect or DonorPerfect Online, allowing you to manage all transactions in a unified way

# Appendix A —Tables & Field Descriptions

This appendix outlines the fields included in each of the following tables: **DP.DBF**, **DPADD.DBF**, **DPPHONE.DBF**, **DPPHONID.DBF**, **DPGIFT.DBF**, **DPOTHER.DBF**, **DPOTHER2.DBF**, and **DPCODES.DBF**. For each field, you'll see the name of the field, the data type, and a brief description. If you need more information on any field, please contact DonorPerfect support.

## **Main (DP.DBF) Table**

The DP.DBF table includes the main demographic information for donors in your system; it also includes calculated fields information. The following grid details the fields included in DP.DBF. The grid uses the following notations to denote specific types of fields:

\*Required Fields

\*\*Calculated but Optional

\*\*\*Additional Module Fields

<b>Field</b>	<b>Data Type</b>	<b>Description</b>
AUTOCALC1	Numeric	Auto-calculated Field (based on gift or pledge info), (calculated)*
AUTOCALC2	Numeric	Auto-calculated Field (based on gift or pledge info), (calculated)*
AUTOCALC3	Numeric	Auto-calculated Field (based on gift or pledge info), (calculated)*
AUTOCALC4	Numeric	Auto-calculated Field (based on gift or pledge info), (calculated)*
AUTOCALC5	Numeric	Auto-calculated Field (based on gift or pledge info), (calculated)*
AUTOCALC6	Numeric	Auto-calculated Field (based on gift or pledge info), (calculated)*
AVG_AMT	Numeric	Average Amount (all time) **
CYTD	Numeric	Calendar Year YTD Count - This Year / 12 month total this year based on the calendar year (calculated)**
DIDNUMB	Numeric	Unique Record ID Number*
DONOR2	Character	Record Number *
ENR_DT	Date	Membership Reports - Membership Enrollment Date fields ***
ENT_DT	Date	Initial Entry Date*
EXPIR	Date	Membership Reports - Membership Expiration field ***

<b>Field</b>	<b>Data Type</b>	<b>Description</b>
FLAGS	Character	Special Characteristics (for example, BD, VOL, STF)
GIFTS	Numeric	Total Number of Gifts (calculated)*
GIFTS_C1	Numeric	Calendar Year YTD Count - This Year / 12 month count for this year based on the calendar year (calculated)**
GIFTS_C2	Numeric	Calendar Year YTD Count - Last Year / 12 month count for last year based on the calendar year (calculated)**
GIFTS_C3	Numeric	Calendar Year YTD Count - Two Years Ago / 12 month count for two years ago based on the calendar year (calculated)**
GIFTS_C4	Numeric	Calendar Year YTD Count - Three Years Ago / 12 month count for three years ago based on the calendar year (calculated)**
GIFTS_C5	Numeric	Calendar YTD Count - Four Years Ago / 12 month count for four years ago based on the calendar year (calculated)**
GIFTS_F1	Numeric	Fiscal Year YTD Count - This Year / 12 month count for this year based on the fiscal year setting (calculated)**
GIFTS_F2	Numeric	Fiscal Year YTD Count - Last Year / 12 month count for last year based on the fiscal year setting (calculated)**
GIFTS_F3	Numeric	Fiscal Year YTD Count - Two Years Ago / 12 month count for two years ago based on the fiscal year setting (calculated)**
GIFTS_F4	Numeric	Fiscal Year YTD Count - Three Years Ago / 12 month count for three years ago based on the fiscal year setting (calculated)**
GIFTS_F5	Numeric	Fiscal Year YTD Count - Four Years Ago / 12 month total for four years ago based on the fiscal year setting (calculated)**
GRADYR	Character	School Reports - Graduation Year ***
GTOT	Numeric	Total Contribution Amount (calculated)*
IDNUMB	Numeric	Unique record number **
IN_DT	Date	Initial Gift Date (calculated)*
IN_GL	Character	GL code or description of the first gift contributed**
IN_SOL	Character	SOL code or description of the first gift contributed**
LM_DT	Date	Last Contact Date (calculated)*
LS_AMT	Numeric	Last Contribution Amount (calculated)*
LS_DT	Date	Last Contribution Date (calculated)*
LS_GL	Character	GL code or description of the last gift contributed**

Field	Data Type	Description
LS_SOL	Character	SOL code or description of the last gift contributed**
LSO_DT	Date	Last Volunteer Date**
LY_CYTD	Numeric	Calendar Year YTD Count - Last Year / 12 month total for last year based on the calendar year (calculated)**
LY_YTD	Numeric	Last Year-to-date / 12 month total for last year based on the fiscal year setting (calculated)*
LY2_CYTD	Numeric	Calendar Year YTD Count - Two Years Ago / 12 month total for two years ago based on the calendar year (calculated)**
LY2_YTD	Numeric	Two Years Ago Year-to-date / 12 month total for two years ago based on the fiscal year setting (calculated)*
LY3_CYTD	Numeric	Calendar Year YTD Count - Three Years Ago / 12 month total for three years ago based on the calendar year (calculated)**
LY3_YTD	Numeric	Three Years Ago Year-to-date / 12 month total for three years ago based on the fiscal year setting (calculated)*
LY4_CYTD	Numeric	Calendar Year YTD Count - Four Years Ago / 12 month total for four years ago based on the calendar year (calculated)**
LY4_YTD	Numeric	Four Years Ago Year-to-date / 12 month total for four years ago based on the fiscal year setting (calculated)*
MAIDEN	Character	School Reports - Maiden Name ***
MAILINGS	Character	Solicitations Received*
MAX_AMT	Numeric	Largest Gift Ever (all time) *
MAX_DT	Date	Date of Largest Contribution
MCAT	Character	Membership Reports - Membership Category field ***
MCAT_NUM	Character	Membership Reports - Membership Category Program Number ***
MGPERC	Numeric	Percentage for Matching Gifts **
NARR	Memo	Narrative*
NOEMAIL	Logical	Do not Email**
NOMAIL	Logical	Do not Mail *
PCOUNT	Numeric	Total Number of Pledges (all time) **
POTEN	Numeric	Potential Size (same as SIZE unless edited) *
RATING	Numeric	Auto-calculated Formula (based on donor info) **

<b>Field</b>	<b>Data Type</b>	<b>Description</b>
REASON	Character	Reason for Do Not Mail **
SIZE	Numeric	Gift Size (based on largest YTD) (calculated) *
SPOUSE	Character	Spouse's First Name
SWITCH	Logical	Second line over name on labels/mailmerge?*
TAG_DT	Date	Tag Date (used for 2-pass selections)*
TYPE	Character	Type of Donor *
UP_BY1 & UP_BY2	Character	User that updated user-defined fields**
UP_DT	Date	Last Date Edited*
UP_DT1 & UP_DT2	Date	Date that user-defined fields are updated**
UPDOWN	Character	Membership Reports - Recent Past Membership Category field ***
USER_ID	Character	ID of last user to edit (password protect required)**
USER_ID1	Character	ID of user that created record (password protect required)**
UTOT	Numeric	User-Calculated Field (set through Utilities, Recalculation)
VTOT	Numeric	Volunteer Grand Total of Hours
YRSDON	Numeric	Number of years donated (all time) **
YTD	Numeric	This Year-to-date Total / 12 month total for this year based on the fiscal year setting. (calculated)*



**Address (DPADD.DBF) Table**

The DPADD.DBF table includes names and address information for donors and prospects in your system. The following grid details the fields included in DPADD.DBF. The grid uses the following notation to denote specific types of fields:

\*Required Field

<b>Field</b>	<b>Data Type</b>	<b>Description</b>
ADD	Character	Address*
ADD_DT1	Character	Address beginning date range
ADD_DT2	Character	Address ending date range
ADDTYPE	Character	Address Type*
AIDNUMB	Numeric	Unique Record ID Number*
CITY	Character	City*
COUNTRY	Character	Country
DONOR	Character	Record number from DP.DBF (auto-fill)*
FNAME	Character	First Name*
GETMAIL	Numeric	1) every mailing* 2) some mailings 3) no mailings 4) all other mailings than #2
LNAME	Character	Last Name or Organization Name*
LOOKUP	Logical	Name to be used in lookup screen*
MAILCODES	Character	Mailings for this address (alternative addresses only)*
MI	Character	Middle Initial
MOD_DT	Date	Date when modified
PRIORITY	Character	1) show on main screen * 2) show on alternative address screen
PTITLE	Character	Professional Title*
SAL	Character	Salutation*
SECLN	Character	Optional Address Line/Contact Person/Organization Name - Second Address Line*
ST	Character	State*

Field	Data Type	Description
SUFF	Character	Suffix*
TITLE	Character	Mr./Ms./etc. *
USEMAIN	Logical	Use address from main screen? (alternative addresses only)*
USERNAME	Logical	Use name from main screen? (alternative addresses only)*
ZIP	Character	Zip code*

### ***Phone (DPPHONE.DBF) Table***

The DPPHONE.DBF table includes phone number information for donors in your system. The following grid details the fields included in DPPHONE.DBF. The grid uses the following notation to denote specific types of fields:

\*Required by DonorPerfect

Field	Data Type	Description
DONOR	Character	Record number from DP.DBF (auto-fill)*
MOD_DT	Date	Date when modified
PHMASK	Logical	Use mask for this phone number?*
PHONE	Character	Phone number*
PHORDER	Numeric	Order number is displayed on screen*
PHTYPE	Character	Type of phone number*
PIDNUMB	Numeric	Unique Record ID Number*

### ***Linked Phone Numbers (DPPHONID.DBF) Table***

The DPPHONID.DBF table includes the donor names that are linked to phone numbers from DPADD.DBF. The following grid details the fields included in DPPHONID.DBF. The grid uses the following notation to denote specific types of fields:

\*Required by DonorPerfect

Field	Data Type	Description
PH_AIDNUMB	Numeric	Address File ID Number *
PIDNUMB	Numeric	Phone File ID Number *

**Gift (DPGIFT.DBF) Table**

The DPGIFT.DBF table includes gift and pledge history for donors in your system. The following table details the fields included in DPGIFT.DBF. The table uses the following notations to denote specific types of fields:

\*Required by DonorPerfect

\*\*Calculated but Optional

\*\*\*Additional Module Fields

Field	Data Type	Description
AMT	Numeric	Amount of Gift*
BALANCE	Numeric	Total Balance Due (calculated)*
BATCH_NO	Numeric	Batch Number (calculated)*
BILL	Numeric	Total Amount to Bill*
CAMPAIGN	Character	Campaign (auto-assigned based on GL or SOL)
CR_BY	Character	Id of user who created record / Required for Quick Pledge***
CR_DT	Date	Date when created
DATE	Date	Date of Gift / Date Pledge Made*
DELINQ	Numeric	Total Delinquent Amount (calculated)*
DONOR	Character	Record number from DP.DBF (auto-fill)*
EVATT	Numeric	Special Events Reports / Seating Reports - Number Attending ***
EVOWE	Numeric	Special Events Reports / Seating Reports - Amount Owed ***
FMV	Numeric	Fair Market Value; Special Events Reports / Auction Reports - Auction Item Value or non-tax deductible portion or contribution ***
FREQ	Character	Monthly, Quarterly, Annual, Semi Annual, Semi-Monthly, Unusual, Unknown, Pledge Payment Schedule*
GFNAME	Character	Memorial/Honorarium/Guest First Name; Special Events Reports / Seating Reports - Guest First Name ***; Special Events Reports / Team Reports - Team Member First name ***
GIDNUMB	Numeric	Unique ID #*
GIFTTYPE	Character	Type of Gift*
GL	Character	General Ledger Code*
GLINK	Numeric	<b>Gidnumb</b> of pledge linked to this pledge payment*

Field	Data Type	Description
GLNAME	Character	Memorial/Honorarium/Guest Last Name; Special Events Reports / Seating Reports - Guest Last Name ***; Special Events Reports / Team Reports - Team Member Last Name ***
GNARR	Character or Memo	Gift Narrative; Special Events Reports / Auction Reports - Auction Item Description ***
GTEAM	Character	Special Events Reports / Team Reports - Team Name ***
HANDICAP	Numeric	Special Events Reports / Team Reports - Event Handicap Per Participant ***
INITPMT	Numeric	Initial Payment (does not subtract from delinquent)*
INT_WO_AMT	Numeric	Internal Pledge Write-off Amount**
ITEMNUM	Character	Special Events Reports / Auction Reports -Auction Item Number ***
LAST_BILL	Date	Last Date Pledge Billed (calculated)*
LAST_PAID	Date	Last Date Pledge Paid (calculated)*
MOD_BY	Character	Id of user who modified record
MOD_DT	Date	Date when modified
NB_PMTS	Character	Number of Payments: auto-calculates Amount to Bill / Required for Quick Pledge***
NOCALC	Logical	If true, gift is not used for calculated fields
PLAYER	Character	Special Events Reports / Sponsored Event Reports - Participant's Code ***
PLGPER	Numeric	Special Events Reports / Sponsored Event Reports - Amount Pledged Per Unit ***
PLGPMT	Logical	Indicates if a gift is a pledge payment*
RATEG	Date	Auto-calculated formula
RECTYPE	Character	<b>Gift, Pledge, Soft Credit, Notification Entry*</b>
REF	Character	Reference
REMINDER	Logical	Send Pledge Reminder?*
RENEW	Character	New, Renew, or Reinstate (0,1,2) (calculated)*
SEAT	Character	Special Events Reports / Seating Reports - Table Number ***
SLINK	Numeric	<b>Gidnumb</b> of gift linked to this gift (used to link split gifts, soft credits, notification gifts, and pledge payments)*

Field	Data Type	Description
SOL	Character	Solicitation Method Code*
SPLITGIFT	Logical	Is this a split gift?*
START_DT	Date	Date Pledge Starts / Date First Pledge Payment Due*
SUBSOL	Character	Sub-Solicitation Code
TOTAL	Numeric	Total Amount Pledged*
TY_DT	Date	Auto-filled when thank-you file is created
TYLETTER	Character	Thank-you letter #*
WO_AMT	Numeric	Pledge Write-off Amount*
WO_DT	Date	Pledge Write-off Date*

### **Other Information (DPOTHER.DBF) Table**

The DPOTHER.DBF table includes non-financial transactional for donors in your system. The following grid details the fields included in DPOTHER.DBF. The grid uses the following notation to denote specific types of fields:

\*Required by DonorPerfect

\*\*\*Additional Module Fields

Field	Data Type	Description
DONOR	Character	Record number from DP.DBF (auto-fill)*
DATE	Date	Date of entry *
CLASSYR	Character	School Reports - Class Year ***
CHILD	Character	School Reports - Child's First Name ***
SNAME	Character	School Reports - Last name for child (if different) ***
YEAR_LEFT	Character	School Reports - Year Left School ***

**Contact Management (DPOTHER2.DBF) Table**

The DPOTHER2.DBF table includes the contact management information for donors in your system. The following table details the fields included in DPOTHER2.DBF. The table uses the following notation to denote specific types of fields:

\*Required by DonorPerfect

\*\*\*Additional Module Fields

<b>Field</b>	<b>Data Type</b>	<b>Description</b>
DONOR	Character	Record number from dp.dbf (auto-fill)*
DATE	Date	Date of entry*
DUE_DT	Date	Contact Manager Reports - Due date of contact item ***
COMP_DT	Date	Contact Manager Reports - Date item was completed ***
ACOMM	Character	Contact Manager Reports - Comment ***
BYWHOM	Character	Contact Manager Reports - Contact person's initials ***
ACTIVITY	Character	Contact Manager Reports - Contact activity code ***
MAILING	Character	Contact Manager Reports - Mailing (auto-filled when mailings are run) ***
REQUESTED	Numeric	Grants Manager Reports - Grant Amount Requested ***
FUNDED	Numeric	Grants Manager Reports - Grant Amount Funded ***
FUND_DT	Date	Grants Manager Reports - Grant Funded Date ***
STATUS	Character	Grants Manager Reports - Grant Status ***
PROGRAM	Character	Grants Manager Reports - Grant Program ***

**Code Maintenance (DPCODES.DBF) Table**

The DPCODES.DBF table includes information on the codes in your system. The following table details the fields included in DPCODES.DBF, all of which are required.

Field	Data Type	Description
CODE	Character	Code
DESCR	Character	Description of Code
FIELDNAM	Character	Field Name
INACTIVECD	Logical	Is this an active Code?
MAILED	Numeric	Number Mailed to (SOL)
PRINTING	Numeric	Printing Costs (SOL)
OTHER	Numeric	Other Costs (SOL)
GOAL	Numeric	Solicitation \$ Goal (SOL)
AUTOGL	Character	Auto-fill GL Code (SOL)
CAMPAIGN	Character	Auto-fill Campaign Code (SOL)
CODEDATE	Date	Date connected to this code (ALL)
RECP	Character	Reciprocal Link Code (LINK)
TYSDP	Character	DP file criteria for auto-fill thank-you (TYLETTER)
TYSDPGIFT	Character	Gift file criteria for auto-fill thank-you (TYLETTER)
TYANDOR	Character	Connect criteria with and/or (TYLETTER)

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