New Client
Implementation Checklist

Please print the applicable pages and use them to track your implementation. Consider noting in the top right corner of each section the point of contact for each aspect of your implementation.

To advance to any section of the *New Client Implementation Guide*, click the page reference in the checklist.

Note: Not everything in this document may apply to you. Please refer to your signed quote for the services and products purchased.

Welcome/Screens	**Implementation Coordinator (IC) Contact Information**:

Date Completed	**Implementation Step**
☐ _____	**1. Welcome** (Page 1) Familiarize yourself with the overall Implementation process.
☐ _____	**2. DonorPerfect Introductory Webinar** (Click here to register.) Learn the "big" picture of DonorPerfect, tips for a successful database setup, and how to move forward using the program. We offer this webinar every **Monday at 3 P.M. ET** .
☐ _____	**3. Initial Contact** (Page 2) Your IC contacts you to begin the process.
☐ _____	**4. Screen Video** (Page 2), *DonorPerfect Online Clients Only* The interactive screen video provides pertinent information for designing your DonorPerfect System. Please complete the video that your IC sends to you.
☐ _____	**5. Screen Design** (Page 2) Your IC builds your DonorPerfect system and sends you login details so you can review it.
☐ _____	**6. Online Appointment Scheduling** (Page 2) You must schedule an appointment with your IC to discuss any additional questions or changes.
☐ _____	**7. Screen Appointment/Approval** (Page 3) In this call, you and your IC work toward screen approval.
☐ _____	**8. Data Services Assignment*** (Page 4) On the Monday following your screen approval, we assign a Data Services Specialist to your data conversion.
	** Applies if you purchased **Data Services***

Data Conversion *(if purchased)*	**Data Services Specialist Contact Information**:

Date Completed	**Implementation Step**
☐ _____	1. **Data Conversion Initial Contact** ([Page 4](#)) Your Data Services Specialist contacts you to discuss the steps.
☐ _____	2. **Data Extraction** ([Page 4](#)), *if applicable* Your specialist schedules a time to extract the data from your current system.
☐ _____	3. **Mapping Appointment** ([Page 5](#)) You and your Data Services Specialist review the specifics of converting your data into DonorPerfect.
☐ _____	4. **Mapping Document Review** ([Page 5](#)) To ensure a successful conversion, we provide you with the mapping document. You must verify that the *mapping* document contains all details related to your Data Services.
☐ _____	5. **Final Data Submission** ([Page 5](#)) At the end of your *mapping* appointment, you and your specialist determine the best date for your final data submission.
☐ _____	6. **Data Conversion** ([Page 5-6](#)) Your specialist converts your data into DonorPerfect.
☐ _____	7. **Data Conversion Review** A provided checklist guides your review and confirmation of your converted data.

	Date Completed	Implementation Step

Payment Processing
(if applicable)

Payment Processing Specialist Contact Information:

Date Completed — **Implementation Step**

☐ _____   **1. Application(s) Submission** (Page 8)

- **TrueRate Processing Option** - Best for organizations interested in credit card processing only and processing a smaller volume of transactions. This option excludes Automated Clearing House (ACH) processing.

  Fill out the TrueRate Application.

- **Mercury Payments Option** - Best for organizations interested in more advanced processing options such as ACH or mobile processing.

  Fill out both the Mercury Merchant Application and the Gateway Application.

  If you're also interested in ACH processing, fill out the ACH/E-check Application.

☐ _____   **2. Gateway Account Creation & Activation**
Once all merchant accounts are approved, your Payment Processing Specialist will build your gateway account and send you an email with next steps plus a manual and videos to help you use your new payment processing tools.

☐ _____   **3. Payment Processing Webinar** (Click here to register.)
Attend this webinar to learn how to save time and help raise funds for your organization. We offer this webinar every **Friday at 2 P.M. ET**.

WebLink/DonorPages *(if purchased – does not apply to* ***WebLink Self-Service*** *or* ***WebLink Pro*** *forms)*	**WebLink Specialist Contact Information**:

Date Completed	**Implementation Step**
☐ _____	1. **WebLink Form(s) Assignment** (Page 9) The Monday after the submission of your paperwork, including payment processing applications, we assign a specialist to your WebLink implementation.
☐ _____	2. **Introductory Call** (Page 10) This call from your specialist initiates your WebLink form's implementation.
☐ _____	3. **Draft Setup** (Page 10) Your specialist creates a draft of your online form(s).
☐ _____	4. **Draft Review** (Page 10) This step gives you the chance to review your draft(s) and provide feedback.
☐ _____	5. **Draft Modification** (Page 10) Your specialist addresses your draft revisions.
☐ _____	6. **Getting Started with DonorPages** (Page 18) *(if applicable)* So you can begin exploring DonorPages, your specialist provides you with login credentials and access to training material.
☐ _____	7. **Draft Approval** (Page 10) Since we want you to be extremely satisfied with your form(s), your approval of the draft(s) is required.
☐ _____	8. **Gift Related Codes & Descriptions** You may need to provide codes (e.g., General Ledger, Solicitation, etc.) and corresponding descriptions for the form(s).
☐ _____	9. **Download Setup** (Page 10) Your specialist verifies that all the data collected on your form(s) downloads into your DonorPerfect system.
☐ _____	10. **Download Review** (Page 10) You and your specialist download test records into DonorPerfect.
☐ _____	11. **Confirmation Email to Your Constituents** WebLink can send a customized email to your donors and/or registrants. You may need to provide the content for this email.
☐ _____	12. **Form Activation** (Page 10) Your specialist activates your form(s) and emails you activation details.

DonorPerfect Activation	**IC Contact Information**:

Date Completed	Implementation Step
☐ _____	**4. System Testing** ([Page 12](#)) Your IC reviews and tests your DonorPerfect system.
☐ _____	**5. Final Invoice** ([Page 12](#)) If an outstanding account balance exists or payment information is not on file, your IC provides a final invoice with payment instructions.
☐ _____	**6. Activation Notification** ([Page 12](#)) Once we receive final payment information, your IC sends you an email with your activation information and login details.
☐ _____	**7. New Client Webinar** (Click here to register.) After you receive your Activation Notification, consider attending the New Client Webinar. We offer this webinar every **Friday at 1 P.M. ET**.

Post-activation	

Please contact your IC at anytime with outstanding questions about your implementation.

Once you receive the activation email from your IC, your implementation process is complete and you are ready to get started with DonorPerfect!

For questions regarding the ongoing usage of DonorPerfect, Payment Processing, WebLink, or DonorPages, feel free to contact our Support Department for prompt assistance.

Support Contact Information   support@donorperfect.com   215-628-4343

New Client
Implementation Guide

Table of Contents

To advance to any section, click the desired section title.

1. WELCOME

Welcome to the DonorPerfect Family!
We're thrilled that you've chosen DonorPerfect for your fundraising database needs and know that you are eager to get started using this powerful software. This document details the implementation process and timeframe for each step. The implementation process is a collaboration between you and our Implementation Team. The success and timely completion of this process is based on this partnership. We look forward to working together to create a system that will be the foundation of your successful fundraising efforts for many years to come!

To ensure a smooth and successful implementation, your **Implementation Coordinator (IC)** is your main contact. The IC

- Serves as your contact to address any questions you have during the process.

- Works with you to customize your screens to meet your needs.

- Communicates with the appropriate specialist(s) for a data conversion or WebLink/DonorPages form(s), discusses any specific needs and expectations, and when appropriate, participates in the data mapping, if needed or desired.

- Handles the invoice/delivery process to ensure that your system meets the desired specifications before activation.

- Verifies we deliver all items sold during system activation.

- Contacts you throughout the entire process and is available to answer questions, which may need redirecting or escalating to the appropriate specialist.

Please contact your Implementation Coordinator if you have any questions along the way.

Our Goal:
To provide you with a professional and timely implementation experience allowing for full use of the DonorPerfect system and any other components purchased.

2. SCREEN VIDEO

Step 1 – Estimated Time: Week 1 or 2
After we receive your initial payment and signed proposal, an Implementation Coordinator is assigned to your organization.

Your IC emails you a link to an interactive screen video. This video is the first step in the process of designing a system that meets your needs.

> **Please note:** You must complete the video prior to the actual screen appointment, which we cover further in this guide.

Step 2 – Estimated Time: 2-3 Days after completion of screen video
Once you complete the screen video, your IC emails a link to schedule your screen appointment. Within the email, you receive your login and password allowing you to review your proposed DonorPerfect system based on your screen video feedback.

> **Please note:** You must respond to the appointment scheduling within 15 business days (not necessarily executed within 15 business days). For systems without data conversions, failure to schedule a screen appointment results in the automatic activation of your DonorPerfect Online system after the 15-day working period expires.

3. SCREEN APPOINTMENT/LAYOUT APPROVAL

Step 1 – Estimated Time: Within your scheduled screen appointment
You and your IC will discuss the following in this appointment:

- Custom fields to be added

- Review of your daily practices

- Your requirements in light of how DonorPerfect tracks and manages information

Step 2 – Estimated Time: Within your scheduled screen appointment
Upon review of the DonorPerfect screens, your IC will request your approval allowing for activation of your system.

If you did not purchase a Data Conversion, please proceed to Additional Services.

4. DATA CONVERSION OVERVIEW

Please note: Data conversions are assigned the Monday morning after you've approved your customized screens and fields in DonorPerfect. You can then expect to receive a phone call from a Data Services staff member within 2-4 working days to set up the *data mapping* appointment.

Our data conversion process addresses the migration of your data from its original source into DonorPerfect. More than just simply importing your information, our Data Services professional considers the possible ramifications of how your data is used by your organization. Our staff thoroughly reviews all the data you provide. Your Data Services Specialist works with you to gain an understanding of how you maintained the data in your former database, how best to *map* your data, and how to transfer it into DonorPerfect. In the end, our staff ensures your continual effective use of this data for analysis, reporting, and constituent management. To achieve this desired outcome, your staff may need to research how data is used and interconnected.

Furthermore, our staff will take the time to look for any inconsistencies or problems that may exist in your original data or coding structure, explain them to you, and inform you of options available during the conversion process to address these issues.

This conversion process may include, but is not limited to:

- Revision and/or correction of your existing coded data
- Analysis of how you used your original data
- Review of proper date formats
- Discussion of fields you do not wish to convert
- Comparison of possible differences between the functionality of your current system and DonorPerfect
- Addition of any fields and their placement on the correct screen

Things to Consider in the Data Conversion Process:

- A main point of contact must be included in the *mapping* meeting. If staffing turnover occurs and mapping meetings need to be duplicated, additional costs may be incurred.
- Multiple *mappings* may require additional costs based on time and total appointments.
- *Mapping* meetings with multiple attendees should have a main contact within the meeting.
- The layout of your final data must match the layout of the data you submitted for the mapping appointment.

The sooner we receive your data, the sooner the *mapping* process can begin. It is important to either forward the data from Excel or Access (in most cases) to your Implementation Coordinator or schedule the data extraction as soon as possible.

5. DATA MAPPING APPOINTMENT

Estimated Time: 1-2 Weeks after initial contact by your Data Services Specialist

Please note: *Mapping* appointments cannot take place unless your specialist receives sample data, allowing for review within the meeting.

Step 1
A phone appointment occurs to discuss all aspects of your data conversion. ***A data conversion cannot proceed until this mapping appointment takes place.*** The mapping appointment is a key part of the conversion process and ensures that we transfer your data properly into DonorPerfect. It is possible that more than one *mapping* meeting could take place. Your Data Services Specialist determines the need for a second *mapping* meeting based on the complexity of the data. We review and map fields and code structure in your "source" data to be converted. (Note: We create code translations as needed.) Shortly after the completion of your mapping appointment, the specialist provides for your review a **Mapping Document** containing all the details related to the conversion. You need to verify these details including the accuracy of the mappings based on your specifications. This review also serves as an opportunity to confirm we've discussed in full all the desired data to be converted.

Step 2
At the conclusion of the mapping appointment, you should be prepared to discuss a mutually agreeable timetable for providing SofterWare with the final set of data to be converted. In order to provide the quickest turnaround, we try to schedule the final data delivery so the specialist can begin work immediately. **The turnaround time from our receipt of all final materials to your receipt of the final system is usually within 1-3 weeks**.

6. DATA SERVICES HIGHLIGHTS

Duplicate Record Removal
Our data conversion process does not include the removal of duplicate records.
Based on past experience, this task is best accomplished by the client for several reasons. First, clients find it's important that they themselves decide about duplicates when their system is activated. Equipped with the best knowledge of their constituents, clients can prevent an accidental deletion of the next "major donor." Also, decisions must be made with each duplicate (e.g., which address is correct, is the salutation J.R. or John, is this record a duplicate or just father and son, etc.). DonorPerfect has a user-friendly duplicate maintenance utility, which allows you to remove duplicates efficiently.

Address Adjustments
During the data conversion process, it's possible that our staff will make adjustments to your address information in order to enable you to use your DonorPerfect system more effectively. These changes could include the usage of proper Postal Service abbreviations, a concatenation of address information, and/or an adjustment to the number of address lines used for labels, to name a few. If you have specific requests or concerns about how your addresses will be handled, please let your Data Services Specialist know during the mapping appointment.

DonorPerfect Online's Events Management
Unless you're using DonorPerfect Installed, your current event management data will not be converted into DonorPerfect Online.

7. ADDITIONAL SERVICES

If you've ordered any additional data services from us, they will be performed at the same time as your data conversion. If no data conversion is done, simply contact us after you have entered your data into your new DonorPerfect system. These services include:

DonorSearch Research
Import into DonorPerfect invaluable data on donor giving and wealth indicators from over 25 top databases and allow for segmenting, reporting, and live research in your new software.

NCOA and CASS Certification, and CCOA Processing
Update your records with the latest information from the National Change of Address (NCOA) database and ensure that your data is CASS-certified (Coding Accuracy Support System). We also offer Canadian Change of Address (CCOA) processing.

Deceased Record Identification Service
Identify records of individuals within your DonorPerfect database that are known to be deceased.

HEP Employer Matching Gifts
Increase the value of gifts by finding which companies will match an employee's donation.

Phone Number Appending
Improve the accuracy of constituent phone numbers.

8. PAYMENT PROCESSING

DonorPerfect offers fully integrated tools for processing payments via EFT, Insta-Charge, and WebLink. For further questions about these options, please contact your account manager.

If you wish to process credit card transactions and ACH debits from checking and savings accounts, you will need to complete the applications with our payment processing partners to open the appropriate merchant accounts for your organization.

Once completed and returned, the applications can be processed simultaneously with the other implementation steps. Links to applications are included in the checklist above.

9. **WEBLINK**

WebLink is a web-based system for collecting and managing data online. These forms are personalized to collect your desired data, which can then be quickly downloaded into DonorPerfect or any database you choose. You can even offer secure, online payment processing. **Note:** This section does not apply to WebLink Self-Service forms or WebLink Pro forms. Therefore, if you did not purchase a custom WebLink form, please continue with Activation and Delivery.

Please note that the WebLink implementation will not begin unless we have all the necessary applications for Payment Processing. See Payment Processing for more details on this topic.

The following guidelines have been prepared in order to ensure our clients understand what to expect when we prepare their WebLink form(s). Our highest priority is your satisfaction with the quality of your WebLink implementation.

WEBLINK GUIDELINES

Activation/Payment Processing – Timely activation of your form is dependent on the creation of your merchant processing account(s). We will not be able to activate your form until the creation of your payment processing account. If you have any questions on the status of your account or about the applications themselves, please contact us at Support@SafeSavePayments.com.

Here is an overview of the steps involved in the WebLink Implementation:

Form Assignments – WebLink orders are assigned to a WebLink Specialist on the Monday morning after your order has been processed. **T**he entire WebLink implementation typically takes **4-6 weeks**.

Introductory Call – The WebLink Specialist assigned to your form(s) contacts you to schedule an appointment to review your form(s) and the needs of your organization. Your WebLink implementation cannot proceed until this appointment occurs. During this appointment, the WebLink Specialist provides an expected timeframe for the completion of the initial form design.

Draft Setup – Your WebLink Specialist attempts to create a draft of your online form with a look and feel consistent with your existing website. Our design process is limited. Please keep in mind that a WebLink form is not the same as a website.

Draft Review/Initial Revisions – Once your specialist completes your WebLink draft, you will be granted an opportunity to review it and provide feedback. Your quote includes the cost of one set of form revisions.

Additional Revisions – Other than corrections of typos and small corrections to text/copy, any additional revisions will be completed for a fee of $100/hour, billable in 15 minute increments (minimum of $25). You will be informed if your request for changes will involve an extra expense, and you will be provided an estimate of the time required.

Download Setup/*Download Review* – After you approve your specialized WebLink form, our staff verifies the download into DonorPerfect. Then your WebLink Specialist walks you through downloading. Note: To map the data appropriately, we may need other information along with access to your system.

WebLink Implementation Closure – Your WebLink Specialist will send you an activation email that contains the link(s) to your WebLink form(s). The link(s) then can be added to your website by you or your webmaster. We also recommend that you have your web designer create a graphic or button to make the link more visible.

Upon completion of your WebLink implementation, we expect to provide you with an accurate, comprehensive form that allows you to collect the information you need from your constituents.

10. DONORPAGES

DonorPages provides an easy-to-use online friend-to-friend fundraising system. Constituents can create personalized web pages to raise funds for your campaign or event or for ongoing fundraising on behalf of your mission. DonorPages is also used for registration-only sites, such as a dinner or gala. **Note:** If you did not purchase DonorPages, please continue with Activation and Delivery.

Since DonorPages involves our WebLink forms to provide the integration between the web and DonorPerfect, the process outlined in the WebLink section applies to DonorPages.

Note: The DonorPages implementation will occur concurrently with other aspects of the DonorPerfect implementation process.

11. ACTIVATION AND DELIVERY

Testing and Final Invoice

After your screens are completed, our Implementation staff will perform a review as part of our quality assurance to test for accuracy and usability of your system. Once our testing is completed, your system will then be made available as soon as the final payment has been received.

Activation and Delivery Email

You will receive an email with one or more attachments and instructions on how to access your customized system.

A. Email Attachments

The first attachment is a **Welcome Letter**, which provides:
- Your Client ID
- Information about how to arrange for any training you may have purchased
- Information about your Support plan, including:
    – Important DonorPerfect contact information (Support, Training, etc.)
    – How to call the President's Hotline
    – How to access the Clients Only website
    – Support service descriptions

The second attachment is provided by our data services partners and gives a summary report of the additional data services you purchased (DonorSearch Advanced Prospect Research, NCOA, CCOA, Deceased Record Identification, etc.).

B. How to Access Your Customized System

DonorPerfect Online Clients

The email will provide you information on how to access your customized system. In addition, to learn how to get up and running right away, you'll want to read the "Getting Started Guide" and watch our "Getting Started" videos. Our Support staff is also available to answer your questions and provide any help you need.

DonorPerfect Installed Clients

The email will provide you a link to your **personal** software download page. Here, you'll be able to download:

1. Your Customized Screens or Your Customized Screens and Data
2. DonorPerfect Software
3. Data Services Documentation

Just follow the on-screen instructions on how to download these items. Once downloaded, each item will be automatically checked off so you can be sure you've completed all the necessary steps. In addition, you'll want to read the "Getting Started Guide" to help you get up and running right away. Lastly, our professional Support Department is readily available to answer your questions and provide any help you need.