The Director’s Cut

Your trainer today is:
Kelly Ramage

If you have not printed the presentation, type the link below into your browser

What We Will Learn

- What the Director Needs to Know
- How DonorPerfect is Uniquely Suited for Development Officers
- The benefits of being Online
- How to Access Constituent Information
- How to Track Major Donors
- Manage Contacts, Past & Future
- How Codes Ease Stress
- Financial Reports-Summary and Detail
- How Filters Work & Why They are Good
Why Have a Director’s Cut?

*Development Officers are often consumers of information more than managers of information*

They need to know what a system can do, more than they need to know how to make it work

*DonorPerfect has several tools that can be very helpful to the Development Executive*

The Director’s Cut describes these tools

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DonorPerfect is a Relational Database

- Manage Donor Information
- Track Gift History
- Manage Contact, Event, and Volunteer Information
- Track Pledge History
Virtues of a Relational Database

Data are divided into their own data tables. Biographical data, Gift data, non-financial data, etc….

* * *

Many types of data can be tracked in DonorPerfect and reported in a number of ways

Work with Data types Separately or Together
Flexible and Customizable

Make DonorPerfect reflect the way YOU do business by modifying...

Screens
Fields
Codes
Security
&
Multi-User
Preferences

Not Just Donors!

Manage your entire universe of constituents!

Those who have given money
Those who might give
Volunteers
Major Donors
Foundations
Organizations & Individuals
Event Attendees
&
Many Others…
What Can DonorPerfect Help You With??

TRACKING !!

Track Information!!!

DonorPerfect enables you to...

- Track Donors, Prospects, Volunteers, Grants, etc.
  - Track Money - Gifts and Pledges
  - Track Contacts and Deadlines
- Query data for Reporting and Merging
Follow the Money!

There are many facets to a healthy development agenda. DonorPerfect’s robust financial reporting tools help you understand…

Who is Giving

Why they are giving

How much they are giving

Track Communications!

Past Contacts and Contacts scheduled for the future are easily managed in DPO, helping you strengthen valuable relationships.
Keep Your Efforts on Track!


Know the Story!!

For all of that valuable info not appropriate for a field –
- Recent conversations
- Family events and milestones
- Job changes
- Special interests

Keep notes accessible to all staff in the constituents’ memo field!!
Work Smart!

Use a variety of SmartActions to help your system Help You

Being On-Line Has Its Benefits
Access Anywhere!

*Access the Internet…*
*Access Your Data!!*

*With DonorPerfect Online, your office is wherever you are!!*

---

Data on The Go

*Take your office with you using the DP Mobile app!*
Important Links

- DPO harnesses the power of the internet!
- Access your data from anywhere!
- Find valuable information on your constituents!
- Know where they live!

Email from a Donor’s Record

[Image of email interface with contact information and message]
Find Constituent Records Easily!

Look up records by:
- Keyword
- Name or ID# or any of the Standard Address Fields
- Using full or partial values (type what you know)
  - Searching Alternate Addresses
  - Setting a selection filter

Find Records with Ease!

Just type the **beginning** of a name
OR
“%” and a part of the name

Typing **“%son”** will find
**Anderson Carson Johnson**
Who’s Who…

Categorize your constituents by TYPE…
   Individual
   Company
   School…
   or
Categorize by CONSTITUENCY…
   Board Member
   Volunteer
   Staff
   Alumni…

*Donor Type, Flags and other fields let you
   identify, sort and filter effectively*

---

Use *Donor Type & Flags* to Know
Who’s Who

[Diagram showing fields and options for categorization and donor types]
What They Have Done For You Lately

View a Constituent’s entire Giving History Details & Summary

The General Ledger and Solicitation Codes are key data points that drive your Financial Reporting

Key Gift Data

- How much?
- What is the Money for?
- Which category of Solicitation?
- Which tool brought the money in?
- Which Thank You Letter?
**SOL & GL**
Codes working together to provide solid financial reporting

<table>
<thead>
<tr>
<th>Solicitation</th>
<th>General Ledger</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Spring Mailing 2012) brings the money in</td>
<td>(Building Fund) how the money is budgeted</td>
</tr>
</tbody>
</table>

**Solicitation & Sub-Solicitation**

*Solicitation = Your Big Event 2012*

*Sub-Solicitation =*
*Events within your event or Revenue Streams within your event*

- Seating/Admission
- Silent Auction
- Raffle
Who are Your Major Donors?

<table>
<thead>
<tr>
<th>How much can they give?</th>
<th>How much have they given?</th>
</tr>
</thead>
<tbody>
<tr>
<td>How well do we know them?</td>
<td>Who on our Board or Staff can talk to them?</td>
</tr>
<tr>
<td>Do we know their Income?</td>
<td>Do we know their Interests?</td>
</tr>
</tbody>
</table>

The Bio screen allows you to capture & analyze this kind of info!

Bring It All Together!

[Image of Bio screen and job sheet]
Manage Your Contacts with the “Tickler”

- Future activity entered as a Contact in constituent record
- Due Date & No Completed Date
- Reminder shows on your “Dashboard” as an Open Item

Key Fields for “Tickler”

- **Activity** - Phone call, letter, proposal due, report due, etc.
- **Assigned To** - By whom the activity will be done.
- **Due Date** - Date of Reminder
- **Completed Date** - Removes activity from the Contact Report
Mailing Contacts

This will create a contact entry for all records selected.

Foundation/Grant Contacts

Add the Activity in Foundation’s Contact Record.
Use Contact ‘Tickler’ to Meet Foundation Deadlines

Reminders for:
Intro phone call
Proposal Due
Reports Due
Inquiry Letters
Research Due

Know Your Funders!

The Geographic Region
The Lowest Grant ever funded
The Highest Grant ever funded
The Deadlines
The Assets
The Type of Grants
Run Contact Report on Demand…

Reports, Contact Manager

1) Select A Report:

<table>
<thead>
<tr>
<th>Report Description</th>
<th>Contact Calendar</th>
<th>Moves Management - Open Actions</th>
<th>Moves Management - Closed Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>This Contact Management report will show a listing of all open and closed contacts assigned to particular users.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2) Select Report Options:

- Set Selection Filter...
- Include completed items
- Sort Order: Alpha, Date, Other...
- View open contacts for: Your user ID, All user ID's
- Title for Listing

Note: This report automatically chooses all activity items due that have not yet been completed. Only contacts for your user ID will be displayed unless you choose to view all contacts.

Which Financial Report is Best for you?

**General Reports**
- MTD/YTD Summary
- Income Analysis
- Statistical Tabulation

**Legacy Tribute Reports**
- Memorial Listing
- Memorial Gift Listing
- Memorial Address Listing

**Pledge Reports**
- Actual Cash Flow
- Listing
- Status

**Direct Mail Reports**
- Multi Year Trend Analysis
- Frequency Analysis
- Gift Range Report

And MANY More…
Reporting on Direct Mail and Events

Solicitation Analysis

<table>
<thead>
<tr>
<th>Date</th>
<th>Code</th>
<th>Description</th>
<th>Mailed</th>
<th>Responses</th>
<th>Response %</th>
<th>Total Income</th>
<th>Avg. Gift</th>
<th>Printing</th>
<th>Other</th>
<th>Total</th>
<th>Net Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>09/09/2009</td>
<td>4600</td>
<td>Auction 2000</td>
<td>2000</td>
<td>4</td>
<td>0.40</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
</tr>
<tr>
<td>09/09/2009</td>
<td>4600</td>
<td>Auction 2000</td>
<td>2000</td>
<td>4</td>
<td>0.40</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>09/09/2009</td>
<td>4600</td>
<td>Auction 2000</td>
<td>2000</td>
<td>4</td>
<td>0.40</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
</tr>
<tr>
<td>10/16/2009</td>
<td>3900</td>
<td>Full Wrapping 2000</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
</tr>
<tr>
<td>10/31/2009</td>
<td>3900</td>
<td>Full Wrapping 2000</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
</tr>
<tr>
<td>11/05/2009</td>
<td>3900</td>
<td>Full Wrapping 2000</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
</tr>
<tr>
<td>11/30/2009</td>
<td>3900</td>
<td>Full Wrapping 2000</td>
<td>0</td>
<td>0</td>
<td>0.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
<td>$300.00</td>
</tr>
</tbody>
</table>

- Shows response rates, net income, trends from year to year
- Shows percentage achieved towards revenue goal
- Costs and number of items mailed entered in Utilities, Code Maintenance

Revenue and Donor Trend Analysis

Comprehensive Donor Revenue Analysis as of 10/12/2009

<table>
<thead>
<tr>
<th></th>
<th>Current Year 10/12/2009</th>
<th>Prior Year 10/12/2008</th>
<th>Two Years Age 10/12/2007</th>
<th>Amount Difference Current Year vs. Prior Year</th>
<th>Percent Change Current Year vs. Prior Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Donors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Active Donors</td>
<td>72</td>
<td>77</td>
<td>32</td>
<td>-2</td>
<td>-2.00%</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>$347,028.68</td>
<td>$318,720.44</td>
<td>$393,200.00</td>
<td>$33,700.75</td>
<td>10.55%</td>
</tr>
<tr>
<td>Number of Gifts</td>
<td>144</td>
<td>199</td>
<td>51</td>
<td>-55</td>
<td>-27.54%</td>
</tr>
<tr>
<td>Revenue Per Gift (Average Gift)</td>
<td>$4,937.95</td>
<td>$4,044.54</td>
<td>$1,702.92</td>
<td>$1,234.03</td>
<td>31.13%</td>
</tr>
<tr>
<td>Gifts Per Donor</td>
<td>1.92</td>
<td>2.56</td>
<td>1.31</td>
<td>-0.66</td>
<td>-25.59%</td>
</tr>
<tr>
<td>Retained Donors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Retained Donors</td>
<td>62</td>
<td>43</td>
<td>26</td>
<td>26</td>
<td>62.55%</td>
</tr>
<tr>
<td>Donor Retention Rate</td>
<td>2.67%</td>
<td>4.16%</td>
<td>0.54%</td>
<td>36.51%</td>
<td>87.21%</td>
</tr>
<tr>
<td>Retained Donor Revenue</td>
<td>$338,185.00</td>
<td>$229,540.00</td>
<td>$108,645.00</td>
<td>$109,540.00</td>
<td>-47.33%</td>
</tr>
<tr>
<td>Revenue Retention Rate</td>
<td>91.49%</td>
<td>60.30%</td>
<td>15.58%</td>
<td>37.34%</td>
<td>61.64%</td>
</tr>
<tr>
<td>New Donors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of New Donors</td>
<td>9</td>
<td>12</td>
<td>3</td>
<td>-1</td>
<td>-10.00%</td>
</tr>
<tr>
<td>New Donor Revenue</td>
<td>$7,018.68</td>
<td>$11,772.56</td>
<td>$5,500.00</td>
<td>$4,250.88</td>
<td>-40.30%</td>
</tr>
<tr>
<td>Number of New Donor Gifts</td>
<td>14</td>
<td>24</td>
<td>8</td>
<td>-6</td>
<td>-11.07%</td>
</tr>
</tbody>
</table>

- Compares 3 years’ statistics
- Revenue per Donor and per Gift
- Growth and attrition rates
Comparing Years at a Glance
Statistical Tabulation

<table>
<thead>
<tr>
<th>GL_CODE</th>
<th>Count of Donors</th>
<th>Count of Gifts</th>
<th>Average Amount</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building Fund BF</td>
<td>20</td>
<td>40</td>
<td>$707.25</td>
<td>$28,290.00</td>
</tr>
<tr>
<td>Disaster Relief</td>
<td>17</td>
<td>20</td>
<td>$1,283.55</td>
<td>$25,711.00</td>
</tr>
<tr>
<td>Education ED</td>
<td>26</td>
<td>33</td>
<td>$267.30</td>
<td>$8,821.00</td>
</tr>
<tr>
<td>Membership ME</td>
<td>8</td>
<td>8</td>
<td>$153.13</td>
<td>$1,225.00</td>
</tr>
<tr>
<td>Outreach OR</td>
<td>1</td>
<td>1</td>
<td>$100.00</td>
<td>$100.00</td>
</tr>
<tr>
<td>Scholarship SC</td>
<td>2</td>
<td>2</td>
<td>$5,025.00</td>
<td>$10,050.00</td>
</tr>
<tr>
<td>Unrestricted UN</td>
<td>76</td>
<td>112</td>
<td>$374.62</td>
<td>$41,957.50</td>
</tr>
<tr>
<td>Grand Totals:</td>
<td>160</td>
<td>217</td>
<td>$535.27*</td>
<td>$116,154.50</td>
</tr>
</tbody>
</table>

- Shows totals per segment of choice
- Reports for selected date range
- Total Amount drills down to list of donors who gave per segment

Last Year But Not This

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Last Date</th>
<th>Last Amount</th>
<th>Last Year-to-Date</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alstonton High School</td>
<td>74</td>
<td>2/17/2009</td>
<td>$1,000.00</td>
<td>$1,200.00</td>
<td>$4,007.56</td>
</tr>
<tr>
<td>Adams Motors Corporation</td>
<td>45</td>
<td>3/8/2009</td>
<td>$15,500.00</td>
<td>$14,700.00</td>
<td>$31,800.00</td>
</tr>
<tr>
<td>Allen, O. J.</td>
<td>136</td>
<td>3/1/2009</td>
<td>$34.34</td>
<td>$34.34</td>
<td>$34.34</td>
</tr>
<tr>
<td>Beattie, John R.</td>
<td>32</td>
<td>3/5/2009</td>
<td>$146.00</td>
<td>$1,142.00</td>
<td>$9,692.00</td>
</tr>
<tr>
<td>Charles Sports, Inc.</td>
<td>79</td>
<td>9/17/2009</td>
<td>$100.00</td>
<td>$1,000.00</td>
<td>$2,750.00</td>
</tr>
<tr>
<td>Cheltenham H.School</td>
<td>80</td>
<td>2/17/2009</td>
<td>$1,000.00</td>
<td>$1,200.00</td>
<td>$7,940.00</td>
</tr>
<tr>
<td>Cohen, Evan</td>
<td>81</td>
<td>3/19/2009</td>
<td>$15,000.00</td>
<td>$15,000.00</td>
<td>$15,160.00</td>
</tr>
</tbody>
</table>

- Lists donors who gave last year, but not this year
- Displays last gift, last year fiscal giving, and grand total
- Excel file can be created for mailing to donors
Some Year But Not This

Donor Giving Analysis: Some Year But Not This Year (SYBNT)
For 10/12/2009

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Last Date</th>
<th>Last Amount</th>
<th>Last Year-to-Date</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arlington High School</td>
<td>74</td>
<td>2/17/2009</td>
<td>$1,000.00</td>
<td>$1,200.00</td>
<td>$4,097.56</td>
</tr>
<tr>
<td>Adams McKinley Corporation</td>
<td>85</td>
<td>3/8/2009</td>
<td>$12,500.00</td>
<td>$14,700.00</td>
<td>$21,800.00</td>
</tr>
<tr>
<td>Allen, G.J.</td>
<td>130</td>
<td>3/11/2009</td>
<td>$34.24</td>
<td>$34.24</td>
<td>$34.24</td>
</tr>
<tr>
<td>Seattle, John E.</td>
<td>12</td>
<td>3/5/2009</td>
<td>$146.00</td>
<td>$1,142.00</td>
<td>$8,692.00</td>
</tr>
<tr>
<td>Champs Sports, Inc.</td>
<td>72</td>
<td>9/17/2009</td>
<td>$100.00</td>
<td>$1,000.00</td>
<td>$2,750.00</td>
</tr>
<tr>
<td>Cheetham High School</td>
<td>80</td>
<td>2/17/2009</td>
<td>$1,000.00</td>
<td>$1,200.00</td>
<td>$7,840.00</td>
</tr>
<tr>
<td>Cohen, Evan</td>
<td>81</td>
<td>2/17/2009</td>
<td>$15,000.00</td>
<td>$15,000.00</td>
<td>$15,160.00</td>
</tr>
<tr>
<td>Comcast Cable</td>
<td>82</td>
<td>9/8/2008</td>
<td>$10,000.00</td>
<td>$0.00</td>
<td>$10,160.00</td>
</tr>
<tr>
<td>Dewey, Cheetham &amp; Howe</td>
<td>47</td>
<td>2/17/2009</td>
<td>$250.00</td>
<td>$2,500.00</td>
<td>$3,000.00</td>
</tr>
<tr>
<td>Dotsau, Jacob</td>
<td>8</td>
<td>9/11/2008</td>
<td>$0.00</td>
<td>$700.00</td>
<td>$12,790.00</td>
</tr>
<tr>
<td>Dunn, Jack</td>
<td>86</td>
<td>2/17/2009</td>
<td>$5,000.00</td>
<td>$5,000.00</td>
<td>$6,615.00</td>
</tr>
<tr>
<td>Emerson, James</td>
<td>50</td>
<td>10/10/2008</td>
<td>$200.00</td>
<td>$300.00</td>
<td>$1,750.00</td>
</tr>
</tbody>
</table>

- Lists donors who have given in the past, but not this year
- Displays last gift, last year fiscal giving, and grand total
- Might require use of a filter to exclude inactive or deceased donors

Top Donor

Top Donor Listing

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
<th>Last Date</th>
<th>Last Amount</th>
<th>Year-to-Date</th>
<th>Last Year-to-Date</th>
<th>Grand Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Depot</td>
<td>90</td>
<td>3/8/2009</td>
<td>$150,000.00</td>
<td>$0.00</td>
<td>$150,000.00</td>
<td>$266,950.00</td>
</tr>
<tr>
<td>Starbucks, Inc</td>
<td>91</td>
<td>3/8/2009</td>
<td>$150,000.00</td>
<td>$0.00</td>
<td>$150,000.00</td>
<td>$100,515.00</td>
</tr>
<tr>
<td>UnitedHealth</td>
<td>93</td>
<td>3/8/2009</td>
<td>$70,000.00</td>
<td>$0.00</td>
<td>$70,000.00</td>
<td>$100,005.00</td>
</tr>
<tr>
<td>CVS</td>
<td>94</td>
<td>3/2/2009</td>
<td>$250.00</td>
<td>$0.00</td>
<td>$250.00</td>
<td>$89,765.00</td>
</tr>
<tr>
<td>Landsdowne, Roger</td>
<td>75</td>
<td>3/7/2009</td>
<td>$75,000.00</td>
<td>$2,567.00</td>
<td>$77,567.00</td>
<td>$43,687.00</td>
</tr>
<tr>
<td>James Basky Foundation, Inc</td>
<td>130</td>
<td>3/5/2009</td>
<td>$2,560.00</td>
<td>$37,660.00</td>
<td>$0.00</td>
<td>$37,660.00</td>
</tr>
<tr>
<td>Honesty, Basky Foundation, Inc</td>
<td>93</td>
<td>3/8/2009</td>
<td>$5,000.00</td>
<td>$0.00</td>
<td>$5,000.00</td>
<td>$27,055.00</td>
</tr>
<tr>
<td>Ford Foundation, Inc</td>
<td>92</td>
<td>3/8/2009</td>
<td>$500.00</td>
<td>$0.00</td>
<td>$500.00</td>
<td>$15,155.00</td>
</tr>
<tr>
<td>Catwalk, Inc</td>
<td>90</td>
<td>3/2/2009</td>
<td>$5,000.00</td>
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</table>

Ranks donors based on a Calculated Total Field such as YTD, LY_YTD, GTOT
Link to Favorite Reports

One-Click access to Your Favorite Reports

Favorites are user-based

Choose “Home” Reports

Your favorite reports are kept handy on your Dashboard
Filtering with SideBar

- Time saver
- Easier
- Ad-hoc selecting
- User-specific field list
- Only works as “AND”
- Still choosing Which Records

SideBar

Specific Report Options

Option to Set Selection Filter

Time saving SideBar for choosing records
Robust Filtering!

*Apply specific criteria to choose which donor or what data is included in reports or mailings*

**Selecting Records**

1) **Which Screen/Table?**

   - Main/Bio
   - Other Addresses
   - Gifts/Pledges
   - Contact
   - Other Info
   - Link

2) **What Fields?**

   Use the field name i.e., first_name, flag, solicit_code, ytd, amt

3) **How to Compare?**

   Choose a Condition i.e. exactly equal to, greater than, between, contains

4) **What is the Comparison?**

   Enter the Field Value

**Selected Records**
Remember

- DonorPerfect is relational, flexible, and customizable
- DonorPerfect can track data about different types of donors
- Major Donors can be identified and tracked by you
- The Contact Manager improves contact and deadline tracking
- Grants can be managed in a timely manner
- Many financial reports to choose from to analyze data
- Selection Filters and SideBar choose which records to display in reports

CONGRATULATIONS!!

…for completing the Director’s Cut webinar.

Visit us at www.donorperfect.com or www.softerware.com for a complete schedule of other webinars.