

Donor PerfectTM

Version 8 Highlights and Installation Instructions

Read this to find out what's new, including:



Report Dashboard

*PDF, XLS, HTML Report
Formats*

Pledge Improvements

Easier Data Entry

Web Links

New and Enhanced Reports

This update is provided at ***no additional cost***
as one of the benefits of your annual Support Plan.

DonorPerfect is better than ever! Many of these dramatic improvements are the result of suggestions from you, our users. We thank you, and welcome further feedback regarding Version 8, or any features and enhancements you would propose. We believe this update will help you use your system better, and demonstrates our commitment to provide the best possible software and support to meet your evolving needs.

This document highlights the many great enhancements included in Version 8, with corresponding page numbers in the new manual so you can easily find additional information.

Eight Looks Great!

New icons, toolbars, screen designs and graphical help tools should make your work quicker, easier and hopefully more fun!

Improved Lookup Screens

All DP lookup screens have been redesigned in a grid format. Not only does this make for a nicer look and feel, but you can now easily control the presentation (e.g., move a column by just dragging it), sort the entries by clicking on a column and, if needed, scroll left and right to allow the display of more fields. (Pages 132-134)

| Donor ID# | Name | secln | address | City | Phone |
|-----------|----------------------------|-----------------|-------------------|------------------|---------------|
| 16 | Mr. & Mrs. Roger Sandstrom | | 2622 N. Adams C | Philadelphia, PA | HOME: (21 |
| 15 | Mr. Richard Seversen, III | | 1650 40th Ave., R | Los Oswego, CA | HOME: (80 |
| 48 | Mrs. William Shakespeare | | 123 Main Street | Harrilnton, ID | 9941 |
| 67 | The Shell Oil Company | Mr. John Rhodes | 55 First Avenue | San Jose, CA | 980 |
| 22 | Mr. William Sletz, Jr. | | 4694 Oak St. | Saint Bart, TX | 782 HOME: (71 |
| 17 | Mr. Ronald Solakian | Ms. Nancy Smith | 2883 S. Wentward | Elkins Park, PA | 18 HOME: (21 |

Note: the **Done** button on this screen was relocated to the lower-right corner to be consistent, and a new **Clear** button speeds clearing an entry or a selection filter to start a new search. The **Done** button now consistently appears in the lower-right corner throughout the system.

Expanded Toolbars with New Icons

The DonorPerfect toolbar now includes the following new icons for quick and easy navigation through the system and even onto the web:



The **Contact Manager** icon allows you to preview or print the Open Item Activity List.



The **Dashboard of Favorite Reports** icon activates your Dashboard, where you can run, add, or edit your favorite reports.



The **DonorPerfect Web Site** icon launches your Internet browser and goes directly to the clients-only section of the DonorPerfect web site.

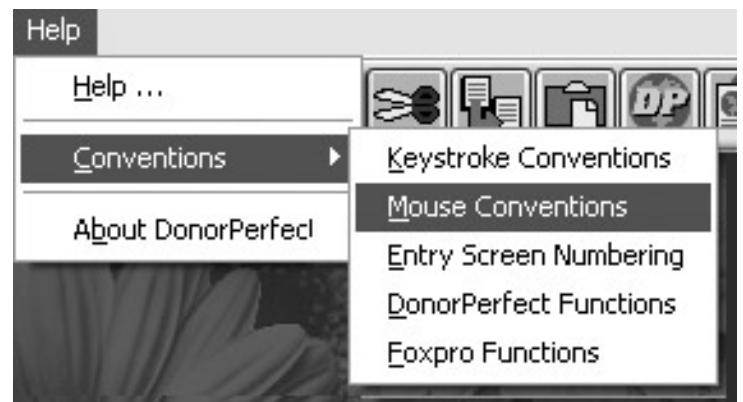


The **User-Defined Web Site** icon launches your Internet browser and goes to a web site you can configure. (Page 96)

For a complete description of all Toolbars and icons, see pages 35-37.

New Manual and Online Help System

The new DonorPerfect manual and online help system has been expanded by over 40% and re-organized with a completely new index and table of contents to help you take full advantage of Version 8.



New Conventions on Help Menu

You can now get some quick help on any of the following topics through the *Program Aids* option on the *Help* menu (details on those topics are also in the new manual):

- Keystroke Conventions (Page 44)
- Mouse Conventions (Page 45)
- Entry Screen Numbering (Page 56)
- DonorPerfect Functions (Page 462)
- FoxPro Functions (Page 455)

Easier Data Entry

Web Hyperlinks

In addition to the web links on the toolbar, you can now add buttons on any entry screen that link to web sites you find useful. Imagine just clicking the link for MapQuest, Yellow pages, a foundation web site, Google automatic last name lookup or other handy sites directly from your DonorPerfect entry screens! (Pages 62-63)

Phone & Email Links to Addresses/Salutations

The Phone Numbers screen now allows you to link an alternate name (or names) from a record's Address/Sal screen to a particular phone number or email address. Linking is useful in instances, such as a family where the wife and husband each have their own salutation record, so that phone numbers and emails can be linked to the right person. (Pages 140-141)

Note: You may wish to add a phone number pull-down and a phone icon to the Addr/Sal screen to make it easy to see which phone/email addresses are associated with a particular address.

Set Separate Defaults for the Individual and Organizational Main Entry Screens

These defaults are automatically entered when a new record is created. (Page 112)

New Data Entry Shortcut CTRL+0 (Zero)

In a date field, fills in the current date, and then moves to the next field.

New Address Copy Feature

Copies the address block (all fields) of the current record to the clipboard, so it's available to paste into an email or another program. Click on the toolbar paperclip icon or press **CTRL+B**. (Page 36)

No Email

You can add this new field to your entry screens and mark the record "Do Not Send Email." The *Include "NO EMAIL" Names* check box is now available when generating group emails. (Page 262)

Perfecting Pledges

We've added several new features that make managing and reporting your pledges even simpler!

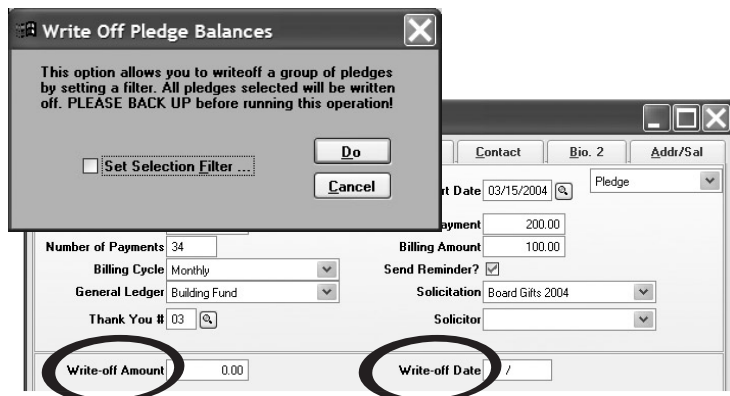
Easier view of Pledge Payments

The Pledge screen now includes a **List Pledge Payments** button that displays all payments made against a specific pledge. (Page 173)

| Date | Amount | General Ledger | Solicitation | Reference |
|------------|--------|----------------|---------------------|-----------|
| 06/14/2005 | 100.00 | Building Fund | Spring Mailing 2005 | |
| 05/14/2005 | 100.00 | Building Fund | Spring Mailing 2005 | |
| 04/14/2005 | 100.00 | Building Fund | Spring Mailing 2005 | |

Simpler Write-off of Pledges from Recalc Menu

In addition to having the option to enter a write-off amount for a specific pledge (see page 168), Version 8 now provides the option to write off the pledge balances for a selected group of donors. For instance, you may choose to write off all pledges for a past capital campaign that ended. The option automatically writes off the remainder of the pledge by filling in the write-off amount with the remaining balance due for the selected donors. This results in a new balance of \$0. (Page 298)



Soft Credits for Pledges

The *Link Name to Pledge* option allows you to link another donor record to a pledge as a Soft Credit (in addition to Notification or Matching Gift Link). Now donors who have been instrumental in attaining pledges from other donors can have Soft Credit gifts in their giving history. (Page 169)

New and Improved Pledge Reports

Several reports have been added to help you plan and analyze your pledge campaigns.

- **Open Pledges—by Individual Report** lists all pledges that are open (e.g., the balance due minus the write-off amount is greater than zero). It also shows pledge and balance totals per donor. (Page 343)
- **Forecast Report** provides a per donor listing of pledge amounts to be billed each month. Unlike the Cash Flow Projection, which always prints the months of January through December, the Forecast Report can be printed starting with any month. The Starting Date you enter on the parameters screen determines the first column of the 12-month report. (Page 342)
- **Forecast Report—Actual** shows actual past months' pledge payments received combined with expected pledge payments (based on past payments). For

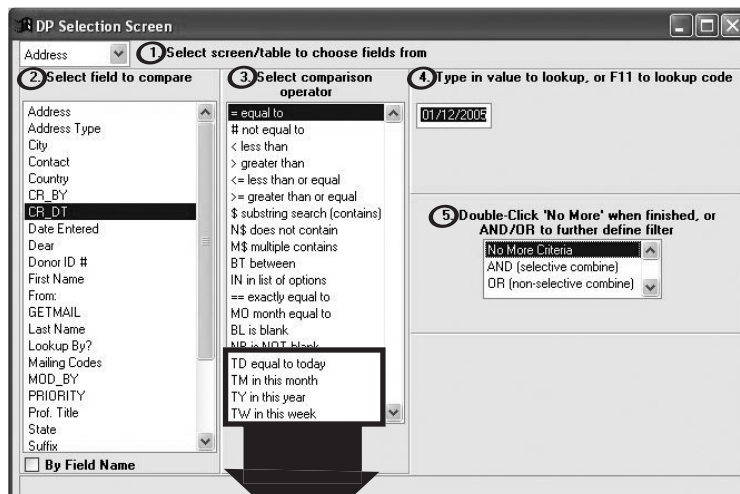
instance, if a donor is delinquent, it shows the delinquent amount as monies still due. If the donor has a credit balance (they pre-paid certain pledge payments), it shows the pledge payment schedule ending before originally planned. (Page 344)

- **Balances Due—Historical Report** provides detailed information on all historical pledges with a balance owed as of a certain date. The layout is the same as the Pledge Listing. (Page 343)
- **Pledge Write-off Report** lists all pledges that have been written off (e.g., the *Write-off Amount* field on the Pledge screen has a value greater than zero). (Page 344)

Simpler Selection Process

The Selection Screen

This screen now has five easy steps to guide you through creating a selection filter. (Page 236-239)



New Date "Operators" for selection

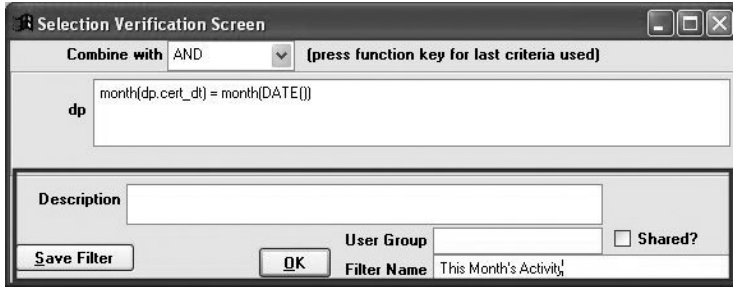
Four new operators are now available when selecting and comparing values on a date field.

- **"TD"** Finds records where the designated date field is equal to **Today's Date**.
- **"TM"** Finds records where the designated field is in **Today's Month**.
- **"TY"** Finds records where the designated field is in **Today's Year**.
- **"TW"** Finds records where the designated field is in **Today's Week**.

For further explanation of all operators, see page 231.

More Control of Saved Filters

Now you can decide whether a saved filter should be shared with all users, a group of users or appear on the list only when a particular user ID logs in! DonorPerfect now also tracks who created a filter and on what date. (Page 125)

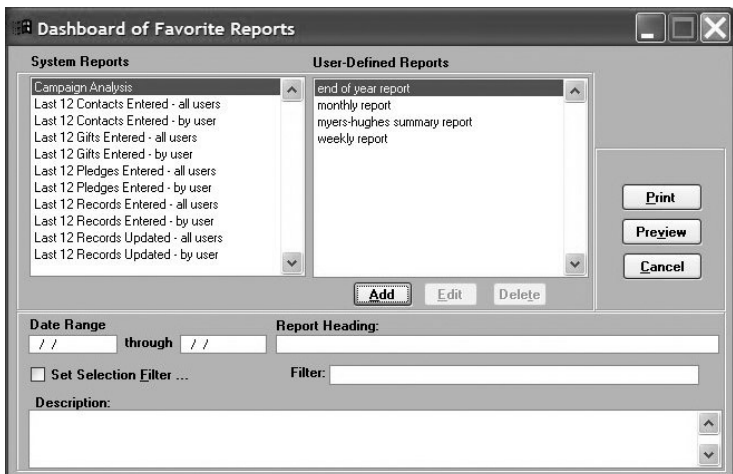


New **User Groups** field and **Shared?** check box manage saved filter sharing

Dramatic Report Enhancements

Report Dashboard

This exciting feature allows you to maintain a personalized set of reports for each user. The dashboard comes preconfigured with a group of reports for viewing recently entered/changed records, gifts, pledges and contacts, but you can add any standard or custom report to your dashboard. You can even give the report a unique name, add notes and save filters to be used each time you run it. The dashboard is also a great way to manage reports that only you or certain users should be allowed to run. (Page 308-315)



Other File Formats for Reports

Now you can produce ANY DonorPerfect report in Word (.DOC or .RTF), Excel (.XLS), Adobe Acrobat (.PDF), Web (.HTML) or Graphic (.BMP) file format. These additional formats make it easy to share (email or publish) and further format/manipulate your reports. (Pages 302 - 304)



Report Layering

Over 20 screen reports now have a "layering" feature that allows you to instantly display an additional report about the donor, gift or pledge record by just clicking on a report item. (Pages 305-306; a complete list of all layered reports with examples is on page 307)

| Donor | Name | Date | Amount | GL | Type | Reference |
|-------|----------------------------|------------|---------|----|------|----------------|
| 42 | International Software | 01/28/2000 | 5000.00 | UN | CK | C14954 |
| 2 | Ms. Joan Jett | 03/13/2000 | 250.00 | UN | CK | John.Jones |
| 3 | Mr & Mrs George Judson | 03/13/2000 | 250.00 | UN | CK | #5645 |
| 4 | Mr. Jim Barkley | 03/13/2000 | 250.00 | UN | CK | #4567 |
| 5 | Ms. Kathy Demetral | 03/13/2000 | 250.00 | UN | CK | #6789 |
| 15 | Mr. Richard Stevenson, III | 03/13/2000 | 1000.00 | UN | CK | #9859 |
| 41 | Mr. Fred Garvin | 03/13/2000 | 1000.00 | UN | CK | #7895 |
| 24 | Mr. & Mrs. Joseph Johnson | 03/13/2000 | 500.00 | UN | CK | #5746 |
| 45 | Adams McKinley Corporation | 03/21/2000 | 1500.00 | UN | WG | Roger Sardisba |

| 05/10/2005 | | B000 - Banquet 2000 | |
|--|----------|---|----------|
| Count: | 9 | Total: | 41 |
| Mr. Fred Garvin | | HOME: (212)354-6245 CELL: (212)354-6244 EMAIL: Fred@Gaven.com | |
| Reason: Flags: AM,BO,DE Mail No: Created: 11/29/1997 - Modified: 12/29/2004 Type: Individual | | | |
| Giving Information | | | |
| --- Sub-totals - Fiscal Year --- | | --- Sub-totals - Calendar Year --- | |
| 2005 | 80.00 | 2005 | 80.00 |
| 2004 | 1,500.00 | 2004 | 1,500.00 |
| 2003 | 1,000.00 | 2003 | 1,000.00 |
| 2002 | 0.00 | 2002 | 0.00 |
| 2001 | 0.00 | 2001 | 0.00 |
| First Donation: 11/29/1997 | | Last Donation: 01/03/2005 | |
| Largest: 1,720.00 | | Grant Total: 5,725.00 | |
| Total number of gifts: 8 | | | |

Save Your Export Formats!

Version 8 allows you to save the export formats you use through the **Listings and Mailings** screen. Once saved, you can add, edit, copy or delete the formats and reuse them whenever needed! (Page 318-321)

Copy Custom Reports

The Custom Report Generator now provides a **Copy Report** check box that can save you time by allowing you to create a copy (and then modify) a custom report. (Page 391)

New and Improved Reports

- **Five Year Giving History Report** shows the past five years of totals for any selected group of donors and can be printed to show fiscal year or calendar year totals. (Page 353)

- **New General Ledger Reports** have been added to the Financial Reports Menu (see pages 358 – 360 for examples of these reports):

The One Week Report subtotals each general ledger code on a daily basis for a particular week.

The Monthly Report subtotals each general ledger code by month (for up to six months) for the date range you enter.

The Quarterly Report subtotals each general ledger code by quarter and shows four quarters and a total.

The Batch Report shows gifts sorted by General Ledger Code. For each GL code, it shows the Type, Date, Solicitation, Amount and Reference for the gift.

- **Thank-You Listing** shows thank-you letters by type (for example, Standard Thank-You, Capital Campaign) that will be produced with a specific batch. (Page 290)

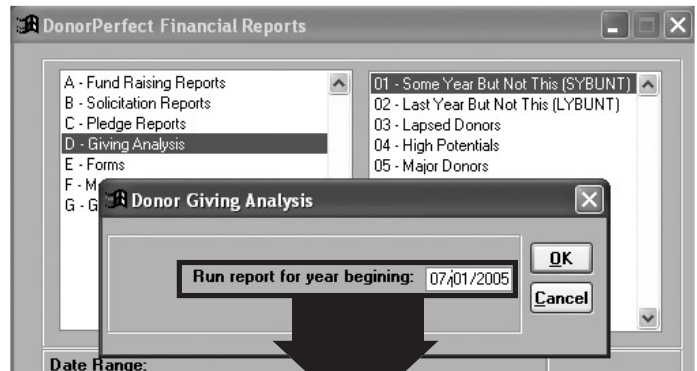
| ID | Name | Type | Date | Solicitation | Amount | |
|--|--|------|------------|--------------|----------|---------------|
| 01 - Standard Thank You | | | | | | |
| 35 | Mr. & Mrs. Hans Delbrook 2730 36th Street SW Wyoming, NJ 07509 | CK | 06/08/2005 | UNSO | 75.00 | |
| 6 | Mr. Jacob Dotsaur 2015 72nd Street S.W. Byron Center, TX 78315 | CK | 06/08/2005 | SP05 | 250.00 | |
| 22 | Mr. William Seitz, Jr. 4694 Oak Street Saint Bart Simpsville, ET 78255 | CC | 06/08/2005 | UNSO | 50.00 | |
| 88 | Mr Edward Grantham 5134 Grantosa Drive Lowell, MA 07426 | CK | 06/08/2005 | UNSO | 75.00 | |
| 40 | Mr. & Mrs. Alvin Relles 2222 Bridle Creek SE. Kentwood, WA 80508 | CK | 06/08/2005 | UNSO | 75.00 | |
| 01 - Standard Thank You | | | | | 5 | 525.00 |
| 03 - Capital Campaign Thank You | | | | | | |
| 45 | Adams McKinley Corporation CEO Andrew Lockley 477 W. Virginia Drive Philadelphia, PA 19011 | CK | 06/08/2005 | SU05 | 500.00 | |
| 03 - Capital Campaign Thank You | | | | | 1 | 500.00 |
| 04 - Major Donor Thank You | | | | | | |
| 16 | Mr. & Mrs. Roger Sandstone 2522 N. Adams Court Philadelphia, PA 19115-3309 | CK | 06/08/2005 | BQ05 | 500.00 | |

- **The Listing of Deleted Names Report** shows constituent records that have been deleted. The “Date Deleted” and user ID of the person who deletes the record will only appear for records deleted using Version 8.0, since tracking this information is another new feature in this update. (Page 353)
- **Last X Records Entered/Last X Records Updated** lists the last x records entered or updated, showing their names and addresses as well as phone number, and last date entered and updated. (Page 313)

- **Campaign Analysis Report** shows the gross and net amounts raised per campaign. Campaigns can be automatically assigned based on the Solicitation or General Ledger code through Code Maintenance. (Page 313)

- **Mailings Received Report** lists all records that have received mailings through the contact manager. (Page 354)

- **SYBUNT & LYBUNT Reports** now allow you to specify a beginning date for the fiscal year to compare to the previous fiscal year(s). (Page 346)



| ID | Name | Amount of Last Gift | Date of Last Gift | Last Year YTD Total | Grand Total |
|----|--------------------------------|---------------------|-------------------|---------------------|-------------|
| 4 | Mr. Jim Barkley, Jr. | 80.00 | 10/13/2004 | 780.00 | 2,610.00 |
| 47 | Dewey, Cheetham & Howe | 0.00 | 05/20/2004 | 125.00 | 1,275.00 |
| 59 | Mr. James Emerson | 25.00 | 07/07/2004 | 175.00 | 1,475.00 |
| 10 | Mr. & Mrs. Edward Hobart | 300.00 | 05/20/2004 | 300.00 | 3,530.00 |
| 44 | The Honest Politics Foundation | 0.00 | 06/01/2005 | 0.00 | 28,000.00 |
| 42 | International Software | 5,000.00 | 08/16/2004 | 5,250.00 | 16,750.00 |
| 12 | Mr. & Mrs. Calvin Johnson | 200.00 | 08/17/2004 | 1,200.00 | 14,895.00 |
| 3 | Mr & Mrs George Judson | 40.00 | 12/27/2004 | 251.00 | 2,491.00 |
| 53 | Mr. Brian Mann | 500.00 | 06/08/2005 | 600.00 | 7,950.00 |

New Report Functions

We’ve added several new functions that can be used when creating custom reports. A complete list of all DonorPerfect functions can be found in the manual’s Appendix.

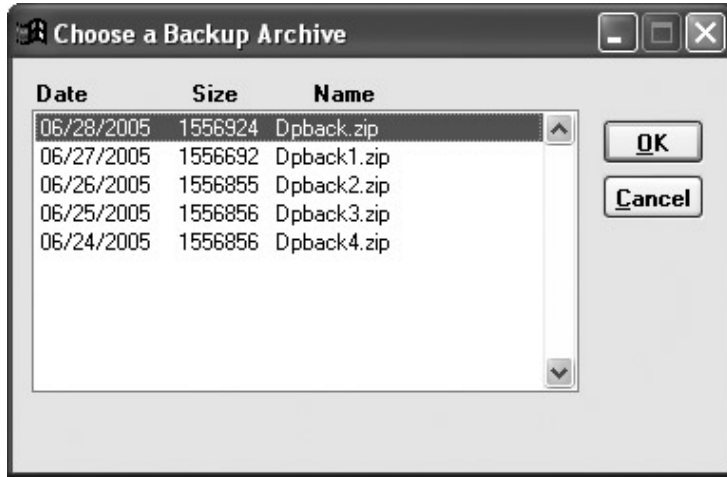
- **amt_due:** returns the amount to be billed for a specific year, month or record number. (Page 463)
- **amt_due2:** returns the amount to be billed for x number of months. (Page 463)
- **getphone2:** returns a phone number of a specific type or number using the phone links. (Page 467)
- **getemail2:** returns email address from the dpphone table for secondary addresses. (Page 466)
- **showgifts:** returns multiple gift lines in a mailmerge file, making it much easier to produce a single letter with all or part of a donor’s giving history. (Page 469)

Administrative Actions and More!

Version 8 includes many enhancements to simplify the administration of your DonorPerfect system.

Enhanced Backup Options

DonorPerfect's built in backup tools now make it easy to maintain up to 9 archived backups with new options for backing up to various devices. (Page 97)



Screen Generator Report

This report provides complete details on the fields and attributes of each of your DonorPerfect screens. The report now appears under the **Screen Generator** menu in **Utilities**. (Page 363)

| Screen Generator Layout Report | | | | | | | | | | | | | | |
|--------------------------------|------------------|----------|------|-----|---------|------------|------------------|--------|------------|--------|-------------|-------------|-----------|-------------|
| Screen #: | Scmprompt | Scmfield | Line | Col | Sub Sem | Field Type | Pic | Valid? | Show Only? | Item # | Help Button | Multi Entry | Show Desc | Field Width |
| Screen #: 0 | | | 0.0 | 0 | | | | N | N | 0 | N | N | N | 0 |
| Screen #: 0 | Org Dropdown | | 1.0 | 1 | 0 | | | N | N | 0 | N | N | N | 0 |
| | Org Name | iname | 1.0 | 98 | 1 | | XXXXXXXXXXXXXXXX | N | N | 1 | N | N | N | 0 |
| | Org Prefix | ipref | 1.0 | 415 | 1 | | XXXXXXXXXXXXXXXX | N | N | 2 | N | N | N | 100 |
| | Contact | scdn | 3.0 | 98 | 1 | | XXXXXXXXXXXXXXXX | N | N | 3 | N | N | N | 0 |
| | Dear | sal | 5.0 | 98 | 1 | | | N | N | 4 | N | N | N | 0 |
| | Prof. Title | ptitle | 7.0 | 98 | 1 | | XXXXXXXXXXXXXXXX | N | N | 5 | N | N | N | 0 |
| | Address | add | 9.0 | 98 | 1 | | XXXXXXXXXXXXXXXX | N | N | 6 | N | N | N | 0 |
| | Web Address | web | 13.0 | 98 | 1 | | | N | N | 7 | N | N | N | 0 |
| | Do Not Send Mail | nomail | 15.0 | 30 | 1 | C | R | N | N | 8 | N | N | N | 0 |
| | Reason | reason | 15.0 | 250 | 1 | | @ | Y | N | 9 | N | N | N | 0 |
| | City, St Zip | city | 11.0 | 98 | 1 | | XXXXXXXXXXXXXXXX | N | N | 10 | N | N | N | 0 |
| | | st | 11.0 | 250 | 1 | | !! | N | N | 11 | N | N | N | 0 |
| | | zip | 11.0 | 285 | 1 | | !!!!!!! | N | N | 12 | N | N | N | 0 |
| Screen #: 1 | | | | | | | | | | | | | | |

Code Maintenance Tracking

We've added two fields to your system that tracks who created a code and on what date. (Page 104)

UTOT for Average Gift Calculation

You can now create a UTOT that calculates the average of gifts contributed. (Page 195)

"About DonorPerfect" Expanded

This menu item provides lots of useful details on your system setup, including the number of user licenses, when your fiscal year begins, who the system is registered to, program directory, mailmerges directory, date of the last backup file, and your client ID.



Improved Record Management

Each constituent record now has a permanent donor record ID #, which will never be reused (even if you "Pack" your database). As a result, deleted records can always be restored. The Restore Deleted Record option (now available on the Utilities menu) makes it easy to restore one or a selected group of records and their entire giving history! (Page 146)

Tell us what you think!

We hope you're as excited about these improvements as we are, and we'd love to hear your impressions and feedback. Visit www.donorperfect.com/suggestions and tell us what you think about this update!

Version 8 Webinar!

Don't wait to get started using the many new features in Version 8. This session will have you up to speed in no time. Learn about new reports, customized to your personal dashboard, saved with the filter you use most, then exported to a spreadsheet for further analysis, or to a PDF for distribution. Space is limited, so enroll today!

Pricing:

\$75 per connection/ \$25 per additional person.
FREE for clients with unlimited webinar subscription!

Register Online: www.donorperfect.com/training

Register by Phone: **888-220-8111**

Version 8 Update Installation Instructions

VERY IMPORTANT! Before you install the Version 8 update, do the following:

- **Make sure your current Version is 7.**

Choose **About DonorPerfect** under **Help** menu to display installed version.

If still using Version 6 or 6.5

Install Version 7 Update (included on the CD) by clicking **Start**, then **Run**, and then type **D:\70 Upgrade\Setup.exe** (or replace **D:** with the letter of your CD-ROM Drive if different). Follow the instructions on-screen.

- **Make a backup—VERY IMPORTANT!**

Log into DonorPerfect. If you have a multi-user version, make sure no one else is currently logged in, and then click the **Utilities** menu, select **Backup**, and then click **Backup to Floppy**. Follow the instructions on-screen, and then close DonorPerfect.

- **Get your User ID**

You'll need your User ID for the update; you can find your User ID on the label of your update package.

Installation for Network Server or Single Computer

Important! If you have a multi-user version, make sure no one else is currently logged in before you run the update. DonorPerfect must be closed when you run the update.

1. Insert the DonorPerfect Version 8 Update CD into the drive. If the CD does not run automatically, click **Start**, then **Run**, and then type **D:\Setup.exe** (or replace **D:** with the letter of your CD-ROM Drive if different)
2. When the **Choose an Option Screen** appears, select **DonorPerfect Program Update**.
3. When the **Welcome** screen appears, read the message, and click **Next**.

4. The next screen prompts you to identify the **Location of the DonorPerfect Data** (Server). The default location is C:\DPW32. If DonorPerfect does not reside there, click **Browse**, select the appropriate drive and directory name, and then click **Next**.
5. When prompted to **Start Installation**, click **Next**.
6. When you see the **Installation Complete** message, click **Finish**.
7. Log into DonorPerfect. The update process will start; a small grey box appears in the upper right corner, which updates you on the steps being performed.
8. You'll be asked to **Add Serial Number to System**; click **Yes**, enter your User ID (only the number; don't enter the D or P) in the **Customer Serial Number** field, and then click **Done**.

The update will complete the installation of Version 8. Your computer may prompt you to reboot.

Update Each Workstation on a Multi-User System

For a multi-user system, you MUST update each computer that will access DonorPerfect.

1. On the workstation you're updating, double-click the DonorPerfect shortcut on the desktop or the **DPW.EXE** file where DonorPerfect is stored. The workstation update automatically starts and installs version 8.0.
2. When the installation is complete, click **OK** at the message that appears.
3. Open DonorPerfect again and log in as usual.

If you have any questions about this upgrade, please call SofterWare support at **215-628-4343**.

You can also e-mail support@donorperfect.com.

Version 8 Update Materials

- **CD-ROM**
- **New User Manual**
- **Description of Enhancements** (see inside)
- **Installation Instructions** (see above)