

Modifications to the DonorExpress Software Standard and Hospice Versions

Updated 05/13/09 - Version 5.2 Build 11

Welcome to the new release of the DonorExpress Software. We have added many new reports and features to this release. We would like to see all users upgrade to the latest version.

Most of these features are a direct result of request made by you the users. We try hard to listen to the request of the not for profit community and make the necessary adjustments to keep our software working well for you guys.

The list below is the major changes that have been made to the software. There have also been many unseen changes made in the background to help the software run more efficiently. Please call 828.264.2577 if you have any questions about the new version of DonorExpress Enterprise Software.

Main Menu

1. The Main Menu now shows the organization name for those organizations that are running more than one organization database in the software.

Donors

Donor Entry Screen

1. The Delete button has been renamed to **Delete Donor** and is now in **RED** to eliminate confusion about the Delete.

Donation Tab (Receipt)

1. The IRS Statement at the bottom of the Receipt has been removed due to the fact that all gifts may not be tax deductible and this was misleading for many organizations. You may still add your own statement at the bottom of the receipt by going to *Admin Tools/Organization Information/Report Messages* and creating your own Receipt Footer statement. We have also added the Payment Type to the Receipt by request.

Pledge Tab

1. The pledge list on the Pledge Tab now has a Pledge Completed check box that show when a pledge has been completed.

Donation Entry Screen

1. If the donor has an Active pledge, the **Donation for Pledge** label will be displayed in red.
2. When closing the Donation Entry screen after entering the final pledge payment for a donor, the user will see a message box asking if they would to mark the pledge Completed.

Pledge Entry Screen

1. The Pledge Entry screen now has a Pledge Complete check box that will indicate when a pledge has been completed. Once the pledge is completed, it will no longer show up on the Donation for Pledge pull-down. These way only Active pledges will show up in the Donation for Pledge box. Old pledges will have to have this check box updated.

Admin Tools

Organization Information/Report Messages

1. The IRS Statement at the bottom of the Receipt has been removed due to the fact that all gifts may not be tax deductible and this was misleading for many organizations. Now you can add your own tax message on the Report Messages tab in the Organization Information screen. The Donor/Pledge Footer Statement now shows on the Donation Statement, Outstanding Pledge Statement and the Pledge Reminder Statement

Merge Duplicate Donors

1. The Duplicate Donor Merge is a new feature that will allow the user with Admin Security rights to combine two donor records and delete one. Now when you run the Duplicate Donor Report it will show you the Donor ID. When you open the Duplicate Donor Merge screen, you will enter the Donor ID for the donor to be merged and deleted. The list below the name and address will show if the donor record has any Donations, Pledges, Grouping or Notes. Next enter the Donor ID for the Donor record that is to be merged into. The list below the name and address will show if the donor record has any Donations, Pledges, Grouping or Notes. The user may now decide what information they want to merge by using the check boxes between the two records. Once all information has been verified, click the Combine Donors button. A message box will appear that will give the user one last chance to review the process that is getting ready to take place before they click YES to combine and delete one record or NO to cancel the process. **WARNING: ONCE THE MERGE AND DELETE HAS BEEN COMPLETED, THERE IS NO GOING BACK.** Backing up the data before cleaning up the database is highly recommended.

Reports

Campaign Reports

Summed Campaign Donations by Date ****Export****

The Export feature under Printing Options has been added to this report for mailing purposes.

Donations Reports

Donation Statements - Active Donors ****Export****

The Donation Statement now displays the Statement Footer Message entered in to the Admin Tools/Organization Information/Report Messages tab. The donor name on this statement did not pull correctly and has been adjusted. This Statement has been reformatted to fit in a windowed envelope.

Donations and Pledges Received Detail Report

This is a new report shows for a date period a line item detail of all donors who gave a donation and/or made a pledge and/or made a pledge payment with grand totals for each column. This report shows a break down along with totals of what has been received in donations, pledges and pledge payments.

Donations By Payment Type

This is a new report shows for a date period a line item detail of all donors and their donations received sorted by Payment Types with the total count and donations totals.

Donors Without Donations ****Export****

This is a new report shows contacts in the database that have never given any money.

First Time Donors ****Export****

This is a new report shows donors who have given a first time gift during the data period. The report shows the donor demographics, the number of times the donor gave with the total for the period and the date of the first gift.

List of Donors

List -Duplicate Donors - Donor Name

This report now shows the Donor's ID number to be used with the Merge Duplicate Donor Function.

List -Duplicate Donors – Organization

This report now shows the Donor's ID number to be used with the Merge Duplicate Donor Function.

Memorial Donation Reports

Previous Honorarium or Memorial Donations **Export**

This report is designed to show all donors who previously gave in honor or memory of someone. This report may be used as a mailing to request repeat gifts in Honor or Memory of someone. This report has the Export feature.

Pledge Reports

*****Pledge Summary of Activity by Date***

This is a pledge report in a summary format that shows the donor and their pledge with a total of pledge payments made up to the end date, a total of pledge payments during the date period and a pledge balance as of the end date. There are grand totals for each column.

Outstanding Pledge Statements **Export**

The Outstanding Pledge Statement now displays the Statement Footer Message entered in to the Admin Tools/Organization Information/Report Messages tab. This Statement has been reformatted to fit in a windowed envelope so you do not need to print envelopes or labels.

Analysis Reports

Donors By Giving Levels **Export**

The Export function has been added to this report but due to the nature of the report, the user must run the report and then use the Export feature found on the Report Menu Bar. The format of the donor name has been change to make publication easier. The old format was Last Name, First Name. The new format is Salutation, First Name, Middle Name and Last Name.

Donors By Giving Levels By Campaigns **Export**

The Export function has been added to this report but due to the nature of the report, the user must run the report and then use the Export feature found on the Report Menu Bar. The format of the donor name has been change to make publication easier. The old format was Last Name, First Name. The new format is Salutation, First Name, Middle Name and Last Name.