



Major Features

Below are just some of the capabilities available to DonorPerfect clients.

Information Management

Donor Management

- User-defined fields and screens
- Relational "household" records
- Unlimited names and addresses
- Cross-reference records

Memberships

- Renewal notices
- Track upgrades and lapsed memberships
- Statistical analysis
- Membership lists and reports
- ID cards

Volunteers

- Volunteer assignments
- Hours and dates of service
- Scheduling
- Solicitation reports

Alumni & Students

- Class lists
- Phonathons
- Maiden names
- Multiple addressing
- School reporting module

Import Module*

- Import donor and/or gift data

Donation Processing

Gift Management

- Automated acknowledgements and receipts
- Soft credits and split gifts
- Memorials and honorariums
- Batch audit trail
- Deposit slips
- Quick gift entry

Pledge Processing

- Unlimited payment schedules
- Automated pledge reminders
- Delinquent pledge reports
- Cash flow projections
- Quick pledge entry

Matching Gifts

- Web access to employer matching gift database

Insta-Charge

- Integrated credit card processing

EZ-EFT Direct Giving*

- Credit card and/or ACH recurring pledge processing

WebLink Online Fundraising*

- Donations, tributes, memberships, event registration and item sales
- Customizable
- Secure and PCI compliant
- Automated e-mail acknowledgement and receipt
- Downloads into your database

Accounting Interface*

- Integrates QuickBooks®, Cougar Mountain® and other popular accounting systems

Gift scanning Module*

- OCR scanner speeds data entry
- Gift processed in batches

Fundraising Efforts

Targeted Mailings & E-Mail

- Address labels
- Bulk mail reports
- ZIP code bundles
- Personalized communications
- Mail house exports
- Insta-Merge™
- Broadcast e-mails and faxes

Grant Tracking

- Proposal management
- Tracking reports
- Foundation profiles
- Cash flow analysis

Contact Management

- Tickler file
- Appointment reports
- Unlimited notes
- Major donor profile reports
- Moves management

Special Events

- Dinners & galas
- Auction Reports
- Golf tournaments
- Walk-a-thons, bike-a-thons, etc.
- Sponsor levels
- Table / seat assignments
- Event summary reports

Wealth ID Screening

- Research donor assets

E-Marketing & Tracking

- Easily create HTML-based emails, newsletters and more! No programming or graphic design experience required
- Tracks opens, click-throughs, bounces, etc.

Reporting & Analysis

Campaign & Solicitation Effectiveness

- Solicitations and appeals
- General Ledger summaries
- Giving analysis

Donation Summaries & Analysis

- Pledge tracking
- Capital campaign analysis
- Major donor analysis
- Cross-tabulations and graphs
- Relationships and affiliations
- ... and many more

Constituent Reporting

- Cross-tabulations and graphs
- Relationships and affiliations
- Over 100 reports included!

Custom Report Writer (optional for DonorPerfect Online)

- Modify any pre-designed or standard report
- Create your own reports
- Easily select fields, sorts and queries
- Column totals and sub-totals

***Available as additional modules.**