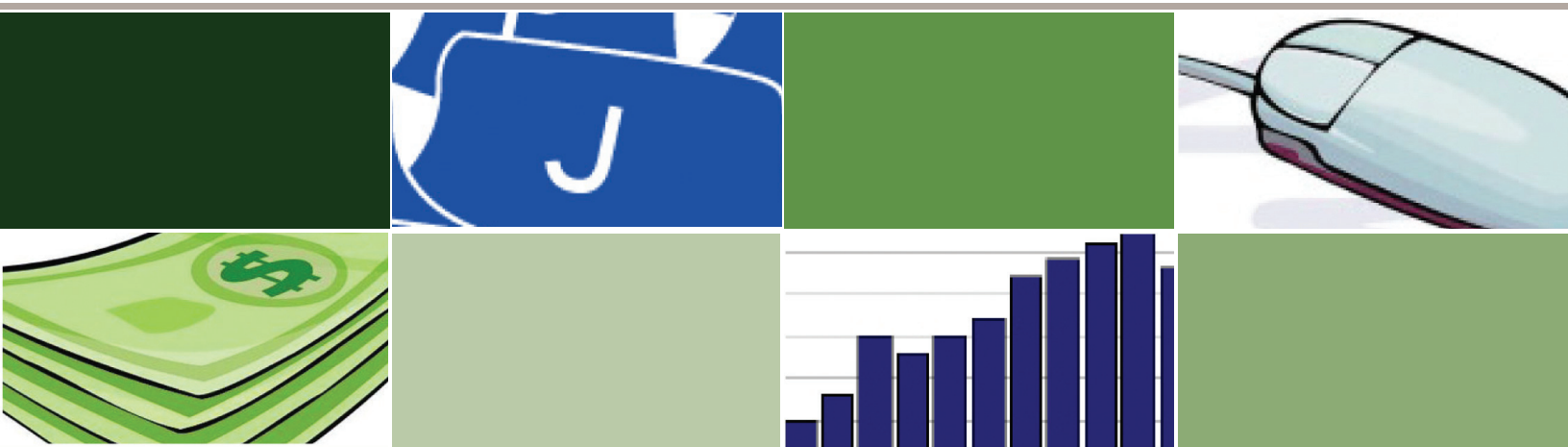# A CONSUMERS GUIDE TO LOW COST DONOR MANAGEMENT SYSTEMS

June 2011

RECOMMENDATIONS

Which of the 29 systems we reviewed are the best? That turns out to be a very complicated question. Most of the systems we looked at had particular strengths, and we could think of a scenario for which almost every system would make sense. That's great news for organizations looking for a system that meets a specific set of needs, but it makes it very complicated to try to understand the market and sift through the options.

But of course, not every system makes sense for every situation. To help you determine which system best meets your needs, we defined a set of scenarios that cover a number of different typical nonprofit scenarios and recommended the best systems, in our opinion, for each.

Each system may be appropriate for more than one scenario. And more than one scenario might fit your own organization's situation. Look through them to find the ones that resonate for you.

Note that all these scenarios assume that you need solid donor management functionality—for instance, that you need to track pledges or advanced gift types, and easily generate printed thank you letters. And throughout the report, we're focusing on systems that cost less than $4,000 in the first year. If your budget or needs differ—for example, if you're looking for a system that tightly integrates with your website, and you don't need any substantial fundraising functionality—you'll find many other systems that might meet your needs as well or better than those recommended here.

Once you're armed with a list of recommended systems that may best fit your needs, you can learn more about them in our Index of Systems, which is arranged in alphabetical order by system name. You'll also find a more-detailed look at the 10 systems that, for us, offer the best combination of functionality, price and attractiveness in a variety of situations. We compare those systems on page 24.

Ready to dive in?

You just need the basics

You don't need to manage a lot of donors or a complex fundraising process—you just need something simple, easy and functional. You have some donors, and do a little soliciting, but don't spend much time fundraising and don't expect it ever to be a huge part of what you do. Events aren't a big part of your fundraising strategy, and you don't plan to move people through any specific prospecting process. You have only have one or two users, less than a few thousand donors, and you want to pay as little as possible.

- **Basic Funder Premier,** by Jellyware Corporation
- **DONATION,** by Software4Nonprofits
- **Donor Tools,** by The Small Idea Company
- **Exceed! Basic,** by Telosa Software, Inc.
- **GiftWorks,** by Mission Research
- **Little Green Light,** by Bicknell Information Group
- **Sumac,** by Sumac

You're a tiny but growing organization, and price is critical

Money is tight, but you want a solid fundraising base that will last as your efforts get more sophisticated. Only one or two people will use the system. You don't have a lot of donors yet, but you're actively fundraising and expect more.

- **CiviCRM,** by Social Source Foundation
- **DonorPerfect,** by Softerware
- **DonorSnap.com,** by DonorSnap
- **eTapestry,** by Blackbaud
- **Exceed! Basic,** by Telosa Software
- **GiftWorks,** by Mission Research
- **NetSuite Do Good Better,** by NetSuite.org
- **Nonprofit Manager,** by Trail Blazer
- **Sumac,** Sumac
- **NEON,** by Z2 Systems

You need something easy to set up and use

You don't have any techies on staff, and you want to focus on fundraising, not on technical or configuration matters. You want a solid fundraising system, and price is a factor, but your priority is a low-maintenance system that won't require a lot of training.

- **DonorPerfect Online,** by Softerware, Inc.
- **DonorPro,** by TowerCare Technologies
- **Donor Tools,** by The Small Idea Company
- **eTapestry,** by Blackbaud
- **GiftWorks,** by Mission Research

Fundraising events are a critical part of your process

You want a donor management system that tracks who comes to your galas, who your table champions are and how much the event raised. You need a system with solid out-of-the-box support for both fundraising- and events-management; the ability to let people RSVP or buy tickets online would be a big plus.

- **DonorPerfect,** by Softerware, Inc.
- **DonorPro,** by TowerCare Technologies
- **Exceed! Premier,** by Telosa Software, Inc.
- **GiftWorks,** by Mission Research
- **Patron Manager,** by Patron Technology
- **NEON,** by Z2 Systems, Inc.
- **Total Info,** by Easy-Ware

You're pretty tech savvy, and you want a free system

You have very little money to spend, but you're willing to spend your own time to get a system up and running and configured to meet your needs. You've got someone pretty tech savvy on staff or on call who would find it fun to figure out a database and help you adapt it to your needs.

- **CiviCRM,** by Social Source Foundation
- **NetSuite Do Good Better,** by NetSuite.org
- **Organizer's Database,** by The Organizer's Collective
- **Salesforce Foundation's Nonprofit Starter Pack,** by Salesforce Foundation

You want to track all your constituents in one system

You do substantial fundraising, but you interact with people in other ways as well—not just event registrants, but other types of people like volunteers, program participants and others—and you want to centralize all that into one system. You want to do it right, and can invest some money or effort if needed.

- **CiviCRM,** by Social Source Foundation
- **Common Ground,** by Convio
- **DonorPerfect,** by SofterWare, Inc.
- **DonorPro,** by TowerCare Technologies
- **Salesforce Foundation's Nonprofit Starter Pack,** by Salesforce Foundation
- **Total Info,** by Easy-Ware Corporation

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You need to integrate the system tightly with email and your website

You do a lot of communications and fundraising online. Any system should be able to talk to your website, automatically pull in online donors, let people sign up for your email list, send out broadcast emails and, ideally, let people update their own information online…as well as support a reasonably robust fundraising program.

- **CiviCRM,** by Social Source Foundation
- **Common Ground,** by Convio
- **DonorPerfect,** SofterWare, Inc.
- **DonorPro,** by TowerCare Technologies
- **Salsa,** by Salsa Labs
- **NEON,** by Z2 Systems, Inc.

You need something highly configurable

Your processes and interactions are truly unique, and the typical functionality offered by most systems won't meet them. You need something that's highly configurable—not just a few custom fields here and there, but something that will let you track custom interactions with people and tailor the workflow to your needs.

- **CiviCRM,** by Social Source Foundation
- **Common Ground,** by Convio
- **DonorPerfect,** by SofterWare, Inc.
- **DonorSnap.com,** by DonorSnap
- **eTapestry,** by Blackbaud
- **NetSuite Do Good Better,** by NetSuite.org

You need access on the go

Your staff members are frequently away from the office and need access online or even on a smartphone. Ease of access from anywhere in a high quality system is your top priority.

- **Common Ground,** by Convio
- **eTapestry,** by Blackbaud
- **NetSuite Do Good Better,** by NetSuite.org
- **NEON,** by Z2 Systems

Other good values

Some of these systems aren't easily categorized by the scenarios above, but are particularly suited for specific audiences.

- **The Databank,** by thedatabank (particularly for advocacy groups)
- **DenariOnline,** by Synergy Development Systems, Inc (particularly for missionary and child sponsorship programs)
- **Organizers Database (ODB),** by the Organizers' Collaborative (particularly for grassroots organizing groups)
- **Sage Fundraising 50,** by Sage (particularly for those with sophisticated but somewhat-tech-adverse fundraising staff)

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THE TOP 10

We took a much more detailed look at 10 of these systems that, for us, offer the best combination of functionality, price and attractiveness in a variety of situations. In selecting the 10, we prioritized functionality to manage complex gift and donor information, issue printed acknowledgement letters, usability, querying and reporting, configurability, managing constituent data beyond donations, and price.

We evaluated 10 systems based on a list of 147 criteria. The matrix on the next page summarizes our findings.

These aren't likely to be precisely the best 10 systems for your needs, as every organizations' needs vary. But they're ones that are strong in fundraising, and likely to be applicable to wide range of organizations.

We evaluated each of these systems based on a list of 147 criteria. The matrix on the next page summarizes our findings based on a rating scheme (the scheme

itself is defined in Appendix B). However, we have much more information! For detailed evaluation for all 10 of these systems, see the Reviews of Low Cost Donor Management Systems, starting on page 28.

Since the first version of this report, the top 10 has seen a few changes. Of the new systems included in this update, two made it into to the top 10: Nonprofit Manager, by Trailblazer, and NetSuite Do Good Better, by NetSuite.org. In addition, CiviCRM, by Social Solutions Foundation is also new to our top 10, but not to our report. Sage Fundraising 50 was bumped from the list, and Orange Leap MPX, which made the top 10 in our last report, didn't meet our selection criteria this time around and thus was not reviewed.

Near-Misses

While not among our top 10, these systems are strong contenders worthy of serious consideration.

- **DonorSnap.com,** by DonorSnap
- **PatronManager,** by Patron Technology
- **Sage Fundraising 50,** by Sage
- **Salesforce Foundation's Nonprofit Starter Pack,** by Salesforce Foundation
- **Sumac,** by Sumac

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CHART OF RECOMMENDATIONS

	CiviCRM	Common Ground CRM (Basic)*	Common Ground CRM (Full)*	Donor Perfect Installed (Basic)*	Donor Perfect Installed (Full)*	Donor Perfect Online (Basic)*	Donor Perfect Online (Full)*	DonorPro	eTapestry (Basic)*	eTapestry (Full)*	GiftWorks (Basic)*	GiftWorks (Full)*	NetSuite Do Good Better	Neon	Nonprofit Manager by Trailblazer	Total Info
Adding and Tracking Donations	Good	Excellent	Excellent	Good	Excellent	Excellent	Excellent	Good	Good	Excellent	Excellent	Excellent	Good	Excellent	Fair	Good
Managing Donor Information	Good	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Good	Good	Good	Good
Prospecting and Proposals	Good	Excellent	Excellent	Good	Excellent	Good	Good	Good	Good	Good	Fair	Fair	Good	Excellent	Fair	Excellent
Permissions	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Excellent	None	Good	Good	Good	Good	Good
Mail-Merging Letters	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Fair	Fair	Good	Good	Excellent	Excellent	Good	Excellent
Emailing	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Good	Good	Excellent	Good	Good	Good
Querying	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good
Reporting	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Good	Good	Excellent	Good	Excellent	Excellent	Excellent	Good	Good	Excellent
Payment and Website Integration	Excellent	None	Excellent	None	Excellent	None	Excellent	Excellent	Fair	Excellent	None	Good	Good	Excellent	Good	Fair
Tracking Events	Good	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Fair	Good	Fair	Excellent	Fair	Good	Good	Good
Tracking Other Built-In Interactions	Good	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Fair	Fair	Fair	Good	Fair	Excellent	Excellent	Excellent
Customization	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Excellent	Fair	Good	Excellent	Good	Fair	Good
Integration	Excellent	Excellent	Excellent	None	Excellent	Excellent	Excellent	Excellent	Fair	Excellent	Fair	Fair	Excellent	Good	Fair	Good
Accounting Support	Fair	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Fair	Fair	Good	Good	Good	Good	Good	Excellent
Ease of Use	Good	Good	Good	Excellent	Excellent	Excellent	Excellent	Good	Good	Good	Excellent	Excellent	Good	Good	Good	Fair
Extent of Support and Training	Good	Good	Excellent	Good	Good	Excellent	Excellent	Good	Good	Good	Good	Good	Good	Good	Excellent	Good
Ease of Installation and Maintenance	Fair	Excellent	Excellent	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent	Excellent	Excellent	Excellent	Fair
Product Background	Excellent	Good	Good	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Good	Excellent

• None   Fair   Good   Excellent

* **Basic** refers to the cheapest version of the system you can buy; **Full** to the version with all upgrades and modules that impact this review.

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DONORPERFECT, ONLINE AND INSTALLED, BY SOFTERWARE, INC.

SofterWare offers two similar but distinct systems: DonorPerfect Installed (DPI), and DonorPerfect Online (DPO). There are small functional differences between them, but for the most part they are very similar. Both are very interesting, with as strong functionality as any system we reviewed in gift and donor tracking, prospecting and support for accounting needs, and laid out to be among the easiest of the systems to use. The systems are very configurable to meet specific processes, including custom fields, custom interactions and the ability to delete or rename fields that aren't helpful to you. They provide useful mail merge functionality, querying and reporting, and a strong integration with Constant Contact in the online version. However, email functionality is not very strong in the installed version—you can't for instance, mail merge fields into emails. An optional module (WebLink) also adds strong online payment and custom form functionality. Both support volunteers and members and include some events functionality There have been significant updates to this system since our 2009 report.

http://www.donorperfect.com

- **Technical Setup:** DonorPerfect Installed is installed onto PC desktop computers. DonorPerfect Online is an online service hosted by DonorPerfect.
- **Pricing:** The Installed version starts at $2,040 for a single user, $4,995 for two users and $645 for each additional user. Yearly maintenance starts at $510 per year and includes email support. The Online version starts at $567 per year for one user account and up to 500 donors. It can quickly increases in price from there—for instance, 25,000 donors and three user accounts would cost about $4,000 per year. Live technical support is extra, starting at $24 per month for the first user and $5 per month for additional users.

Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches name and address information.
- **Quick Search on Custom Fields:** Lets you find a person by searching data entered into custom fields.
- **De-duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name or other criteria you can specify. You are also required to do a search before adding a new donor record.
- **Adding a Gift::** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts:** For ease of reconciling with accounting systems, each donation is automatically assigned to a batch when you process the donations that have not yet been receipted.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface which can be tailored on the fly with the appropriate fields and defaults for a particular set of gifts.
- **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The Import module is included with DonorPerfect Online, but requires an additional cost for DonorPerfect Installed.

- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.
- **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge against the employer when you enter the gift to be matched.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, and in-kind and stock gifts..
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these, as well as to track the solicitation and sub-solicitation that generated a gift.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Gift Notes:** Lets you add free-form notes to a gift.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Zero Dollar Donations:** Lets you enter a gift with a zero dollar value for reporting purposes, as an in-kind gift. Lets you also record the asset value amount of the gift that's tax deductible. You can also exclude zero-dollar donations from certain calculated fields.
- **Gifts "In Honor of" and Tributes:** Lets you track gifts given "in honor of," and tributes, and schedule notifications—for instance, summary thank you letters—to the honorees.
- **Premiums:** Lets you assign and track premiums.

Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, "office" and "cell phone"), mark the primary number and address, and track the donors' preferred contact method.
- **Seasonal Addresses:** Lets you track people's seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.
- **Do Not Contact:** Lets you display a field near the top of the donor screen to notify staff that a particular person should not be contacted.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, "family member," "co-worker") with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way ("would like to meet"), two-way ("spouse") or directional ("boss; works for..."), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationship including the degrees of separation between everyone in the database.
- **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can define which addresses to share or not to share in relationships.
- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with what staff member is responsible for the relationship.
- **Donor Notes:** Lets you enter and view free-form notes about donors.

- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings.
- **Automatic Communications Log:** Automatically stores a record of all system-generated letters and emails for each donor.
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.
- **Donor Source:** Lets you track the source of a particular donor.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.
- **Online Integrated Data Cleaning and Appending:** Lets you link to Wealth Engine by passing donor information from the system to Wealth Engine automatically. Data brought back from Wealth Engine is automatically entered into the system separate from other system fields.
- **Mobile Support:** Lets you access constituent records via a mobile web browser, but is not customized to make records easy to use on a mobile browser.
- **Attaching Docs to Donor Record:** Lets you attach documents to the donor record. Attached documents are stored as as part of the database.
- **Tracking Donor Social Media Information:** Lets you record a donor's social media links to fields in the donor record.

Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You can also create your own custom stages and track a donor's progression through them, with associated dates. In addition, DonorPerfect Online includes a "SmartActions," which lets you automate emails, message, update fields, and more based on system business rules.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on the calendar or in a task list at the appropriate time.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date
- **Donor Research:** Automatically matches donor information to outside resources in order to provide more information on giving capability and priority via a partnership with Wealth Engine. Wealth Engine integration requires an additional cost.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by generating a segment.
- **Proposal Tracking:** Lets you track what proposals are due, what you've submitted and what has already been approved by a particular foundation.
- **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest.
- **Grant Tracking and Reporting:** Lets you track and report on grants separately from other donations, with customizable moves management processes for grant cultivation.
- **Thresholds and Action Triggers:** Lets you schedule reports to run on thresholds. Triggers can be configured via Smart Actions.

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Permissions

- **Permissions:** You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field Level Permissions:** Lets you define user or group permissions on a field-by-field basis through custom security filters.

Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates in Microsoft Word that include mail-merged information. You can then mail merge data into those templates through the system, without the need to export data.
- **Mail Merging on a Mac:** Does not support integrated mail merge on a Mac. However, using DonorPerfect Online, you could download a file and merge manually.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates in Word with complete control over layout, formats, logos and images.
- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them
- **Tracking That Letters Were Sent:** Automatically logs for each donor that a letter was sent.
- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface.
- **Batch Processing of Thank Yous:** Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor's previous giving history, using Microsoft Word's formula functionality.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).
- **Printing Labels:** Lets you easily print labels for a set of people from the same query result page used to print letters.

Emailing

- **One-off Email:** Lets you easily send email to particular individuals from their donor records.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than $500 over their lifetime, and attended a particular event).
- **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and "mail merge" type inserted data.
- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor's previous giving history.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails:** Lets you schedule email to send in the future, but only in the Online edition.

- **Email Server:** Emails are sent via system-integrated Constant Contact, protecting you from blacklisting; Constant Contact takes measures to ensure email goes to donors' inboxes rather than their Spam filters.
- **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization in the online version, but not in the installed version.
- **Email Reports:** Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addressed that didn't go through.
- **Automatic Emails:** Lets you set up automatic emails based on certain events via SmartActions.

Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also define "exclusive not" queries—which exclude the results for one query from a different one. You can also write your own SQL queries if you like.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical "ands" and "ors." They provide particularly powerful yet easy to use functionality in this area—you can define "exclusive not" queries that exclude the results for one query from a different one.
- **Expanding Queries:** Lets you easily limit or expand a query after you've generated the list by editing the filters and criteria from your saved query. This is all done on one screen, reducing the complexity.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update most fields in the database for the list, or export the list.

Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This One (LYBUNT) or donors from Some Year but Unfortunately Not This one (SYBUNT).
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, including th cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad-hoc Reports:** Can create basic ad-hoc reports by choosing what columns you want to include, and adding groups or totals. DonorPerfect Installed allows you to add a custom logo and header, but DonorPerfect Online does not.
- **Custom Fields in Ad-hoc Reports:** Custom fields can be displayed within ad-hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to CSV, Excel, PDF, WORD or Dbase format.

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- **Graphical Capabilities:** Does not let you add charts and graphs to reports.
- **Dashboard Placement:** Lets you place reports on a dashboard for quick viewing.

Payment and Web Site Integration

- **Processing Credit Cards:** Lets you charge donors' credit cards within the system.
- **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors' credit cards at designated intervals.
- **Web Sign-up Form:** People can easily sign up for your email list via an integrated sign-up form on your website, at additional cost, using the WebLink module.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database, at additional cost. This requires their WebLink module.
- **De-duping Online Actions:** Online sign-ups or payments are logged to donors' existing payment records by name or other contact information you can specify. These possible duplicates are presented for your confirmation before being logged in the system.
- **Event Registration:** Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) and meal options.
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards, at additional cost.
- **Distributed/ Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts with an additional module at additional cost.
- **Membership Dues:** Lets members pay membership dues online, at additional cost, using the Web link module.
- **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart.
- **Payment Form Customization:** Vendor provides an online payment form which can be customized to completely match your website.
- **Transaction Fees:** Vendor does not charge a transaction fee for each payment. You will need to set up your own merchant account, which will entail additional transaction fees.
- **Refunds:** Lets you easily issue refunds through the system.
- **Recurring Payments:** Lets donors set up recurring payment online via donor portal, at additional cost, using weblink module.
- **Self Management of Donor Record:** Lets donors manage their own contact information online, but requires a module at additional cost.

Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details:** Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table.
- **Nametags:** Lets you easily create nametags for an event via their standard mail-merge process.
- **On-Site Registration:** Does not provide any specific functionality to support on-site registration.
- **Volunteer Interests:** Lets you track one set of interests in order to match volunteers with jobs.

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- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration and tasks, but no dollar equivalent for their time.
- **Membership Tracking:** Provides functionality to track member levels, payments and expiration dates.
- **Other Interactions:** In addition to the interactions we've covered here, the system offers supports share-a-thon events, product orders with inventory and fulfillment tracking, the ability for online donors to check if their employer will match gifts, and the ability for constituents to update their own information online.

Customization

- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.
- **Custom Fields:** Lets you add virtually an unlimited number of custom fields (up to 256 fields per database table, which equates to over 1,000 fields across the system), which can be placed on most screens in the system.
- **Renaming Fields:** Lets you rename a limited set of existing fields.
- **Moving or Deleting Fields:** Lets you move some fields within the interface, or delete them.
- **Custom Constituent Interactions:** Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization:** Vendor will extensively customize system to your needs as part of the setup process. This customization is free for DonorPerfect Installed, or for DonorPerfect Online if you have fewer than 1,000 donor records. Otherwise, the customization is $95-$995 depending on which level you buy.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality.

Integration

- **Existing Integrations:** Can automatically exchange data with Wealth Engine.
- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data. The Import module is included with DonorPerfect Online, but requires an additional cost for DonorPerfect Installed.
- **Programmatic Integration:** Both DonorPerfect Online and DonorPerfect Installed provide a direct ODBC database connection to all tables in the system to allow a programmer to create custom data feeds to an external system. In addition, DonorPerfect Online includes an API for their Premier level (otherwise it is $348 per month).

Accounting Support

- **Existing Integrations:** Lets you create a file format tailored to upload easily into QuickBooks, Cougar Mountain, Great Plains, MiP and a few other systems, with an additional module at additional cost.
- **Approach to Batching:** Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash and credit payments.
- **Reconciling a Batch:** Cannot mark a batch of payments as "reconciled with accounting." You can mark records as being passed to accounting, but this is not quite reconciliation.
- **Controlling Reconciled Donations:** There is an optional setting that disables the ability to edit a gift after the gift has been processed in a batch. Alternatively, you could restrict the group of people who can edit reconciled donations, or prohibit it altogether, using the (complex) advanced permissions functionality.

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Ease of Use

- **Ease of Use for Novices:** Moderate. The system has a lot of different options and features, but since the vendor will configure it on setup to better match your terminology and workflow on setup, the learning curve is decreased a bit.

- **Speed for Expert Users:** Easy. Experts can design the custom fields and placement to tailor them to their own workflow, and there are a number of quick data entry options. The query building tool provides a lot of control once you've learned how to use it.

Support and Training

- **Training:** Vendor provides free recorded Webinar training, and includes optional paid training either via the internet or live.

- **Manuals and Documentation:** Provides full written documentation, a training video library, and a forum area for users to ask questions of other users.

- **Support:** Vendor provides phone and email support starting at $695 for the installed version and $288 per year for the first user for the online version. Additional users are $60 per year.

Installation and Maintenance

- **Installation and Maintenance:** For the Installed version, as is typical with an installed system, you will need to install the system to your desktops, maintain your own infrastructure, and install your own updates. For the Hosted version, as is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

Product Background

- **History:** Vendor has been in business since 1981. DonorPerfect Installed has been in use by clients since 1986; DonorPerfect Online has been in use since 2001.

- **Clients:** Vendor reports about 8,000 clients for DonorPerfect Installed, and about 3,000 for Donor Perfect Online.

- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it

- **Roadmap:** Vendor indicates that priorities include advanced charting and graphics capability in reports.

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