



New Client  
Implementation Guide



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# Welcome

## **Welcome to the DonorPerfect Family!**

We're thrilled that you've chosen DonorPerfect for your fundraising database needs and know that you are eager to get started using this powerful software. The implementation process is a collaborative effort between you and our Implementation Team. The success and timely completion of this process depends on this partnership. We look forward to working together to create a system that will be the foundation of your successful fundraising efforts for many years to come!

To ensure a smooth and successful implementation, your Implementation Coordinator (IC) is your main contact. The IC:

- Serves as your contact to address any questions you have during the process.
- Works with you to configure your data entry screens to meet your needs.
- Communicates with the appropriate specialist(s) within your implementation team as needed to ensure successful delivery of all products and services purchased.
- Monitors the project in order to help ensure timelines are established, communicated and updated when needed.

## **Implementation Timeline**

Your IC will work with you to put together a timeline for your implementation based on the products and services included in your order. For a client who has purchased a custom data conversion, this timeline will typically range from 4 to 7 weeks from the time your order is finalized. This can vary based on the system from which you are converting and will depend on your active participation and availability to meet the milestones originally established. If you have not purchased a data conversion, you can expect to have access to your system within 1 to 2 weeks of placing your order.

## **DonorPerfect Getting Started Free Webinar Series**

It is never too soon to start learning about DonorPerfect. With that in mind, this guide will reference free live webinars that we recommend as a foundation for success with your new software.

[What is DonorPerfect?:](#) Learn "the big picture" of DonorPerfect including tips for a successful database setup.

# 1. DonorPerfect Configuration

Your Implementation Coordinator (IC) will contact you within 1-2 business days once your order is received. Your IC will provide you information on how to access your initial DonorPerfect system for review. They will also provide instructions on how to schedule your Implementation Coordination appointment and resources for getting started.

## ***Implementation Coordination Appointment***

### **Your IC will review**

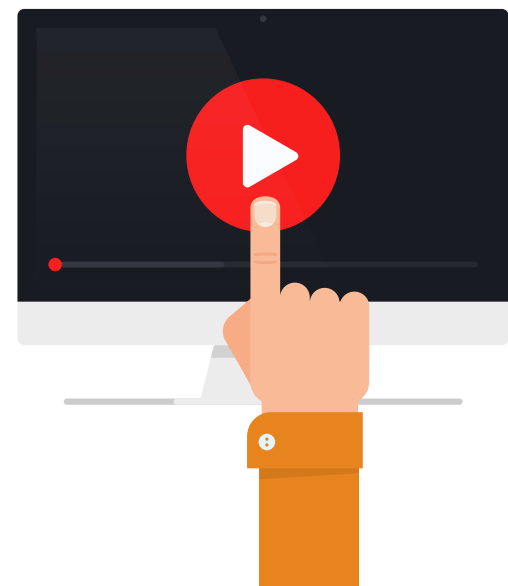
- Your specific data tracking needs and how best to accommodate them within DonorPerfect.
- How to create additional custom fields as needed to capture information unique to your needs.
- Best practices for data entry within DonorPerfect.
- Next steps and scheduling for data conversion, if purchased.
- Available training resources and scheduling of any additional purchased training.

## ***DonorPerfect Getting Started Free Webinar Series***

Once you have completed your Screen Review Appointment, we recommend you attend our data entry webinars.

[Data Entry 101](#): An introduction to data entry to review entering both Individual and Organization records in DonorPerfect.

[Receipting 101](#): Learn best practices for gift entry and introduce the Receipting process.



# 2. Data Conversion

If you have purchased a data conversion, you will be assigned a Data Services Specialist. The Specialist works to gain a better understanding of how you maintained the data in your former database, and then successfully maps the data into DonorPerfect. Our process ensures your effective use of this data for analysis, reporting, and constituent management. To achieve this desired outcome, your staff may need to research how data is used and related in your legacy system.

## **Data Conversion Process**

- **Submission of data for review** – Your IC will request a first set of data for mapping purposes. If you are not able to submit your own data, assistance is available. If another vendor hosts your data, you may be required to contact that vendor for a backup or export of your current data.
- **Data Mapping** – With you, the Data Services Specialist will review your current data structure to determine how the data will best fit within DonorPerfect.
- **Mapping Document** – Your Data Services Specialist will provide a detailed mapping document outlining how your current data translates to DonorPerfect for your review and approval.
- **Final Data Submission** – You will need to submit a complete set of final data for the live conversion. This data must be in the same format as the data used for mapping purposes. Any additional data collected after this submission will not be included in your final conversion.

## **Things to Consider in the Data Conversion Process:**

- Our data conversion process does not include the removal of duplicate records. DonorPerfect offers a user-friendly duplicate removal utility that will allow you to make the final decision on how to handle potential duplicate records from your legacy data on a case-by-case basis.
- Mapping meetings with multiple attendees should have a main contact within the meeting.
- Any data not included in your original quote during the sales process is subject to re-quoting.



# 3. Training

## **Included Resources**

Your success is our success! That is why we provide training material in a variety of formats to best suit your needs. All DonorPerfect clients have access to our [DonorPerfect Community](#), which includes extensive written instruction and video content. We recommend you get started with our [Free Live Webinars](#) and our [QuickStart Videos](#).

## **Additional Training Services**

- **Telephone Training** – Using desktop-sharing technology, we can remotely observe your computer’s screen during training. We see what you see and talk you through each step, using your data. Great for assistance with specific projects or helping new users learn general techniques.
- **On-Site Training** – Clients who prefer one-on-one training or who have specific needs can arrange for a member of our staff to come to their site for comprehensive training or consultation.
- **New Client Consultative Services** – We offer Consultative Services that allow you to ease into DonorPerfect successfully. Our Professional Services staff will suggest better ways of accomplishing your mission after gaining a comprehensive understanding of your organization’s needs.
- **Regional Training Workshop** – These workshops are for those with some DonorPerfect experience. Workshops are held throughout the year in cities across the country.
- **Webinar Subscription** – Webinars are virtual classrooms that bring together groups of people online to interact in a very cost-effective learning environment.



[Training Tracks](#) – No matter what your role is at your nonprofit, DonorPerfect has a training track to match your needs. Whether you are the sole user, are responsible for data entry, or want to get executive level reporting, there is a training program for you.

# 4. Payment Processing

DonorPerfect offers fully integrated tools for processing payments via [EFT](#), [Insta-Charge](#), and [WebLink](#). For further questions about these options, please contact your account manager.

## **DonorPerfect Getting Started Free Webinar Series**

[Payment Processing 101](#): Learn how our integrated payment processing tools will help you save time and raise funds for your organization.

# 5. WebLink

WebLink is our solution for online forms. WebLink integrates directly with your DonorPerfect database. WebLink forms allow you to:

- Collect donations (one-time and recurring options)
- Take online event registrations
- Sell items
- Collect membership dues
- Offer mailing lists sign-ups
- Offer volunteer sign-ups
- Collect survey responses



You can create an unlimited number of forms using our library of templates and make edits to your forms including field labels, auto-email responses, and header text and graphics all through this self-service tool. Any donation or payment form requires DonorPerfect payment processing to be established.

## **DonorPerfect Getting Started Free Webinar Series**

[WebLink 101](#): Learn how WebLink forms collect data and payments and how this data integrates with DonorPerfect.

# 6. DonorPerfect Mobile

[DonorPerfect Mobile](#) combines the database power of DonorPerfect with the convenience of a mobile app to form the perfect traveling companion for DonorPerfect users. A powerful suite of features lets you access your DonorPerfect information at home or on the road, 24 hours a day.

DPMobile also has [Card Reader](#) integration for accepting payments outside the office.

# 7. Additional Services and Partners

## ***DPConnect: The Official DonorPerfect Partner Network***

[DPConnect](#) is a broad network of reputable partners whose tools and solutions complement the tasks you perform in DonorPerfect. Partners range in types of services and solutions offered as well as their level of integration with your DonorPerfect system.

### ***Data Enhancements***

We provide a number of data enhancement options to help ensure your database is as up to date and accurate as possible.

- [DonorSearch Prospect Research](#)
- [NCOA Processing & CASS Certification](#)
- [Deceased Record Identification](#)
- [Phone Number Append](#)

