



# *Version 11*

## *Enhancements Guide*

- **Introduction**
- **New Welcome Screen**
- **Navigation Bar**
- **Keyword Search**
- **Report Screens**
- **SideBar Reporting**
- **Favorite Fields**
- **Data Entry Screen Improvements**
- **Screen Designer Update**

**Enhancements are provided at no additional charge  
as part of your annual support program.**

## Introduction

*Building upon your Suggest and Vote entries, annual surveys, and 25 plus years of experience in the nonprofit industry, we are proud to announce the latest release of DonorPerfect Installed!*

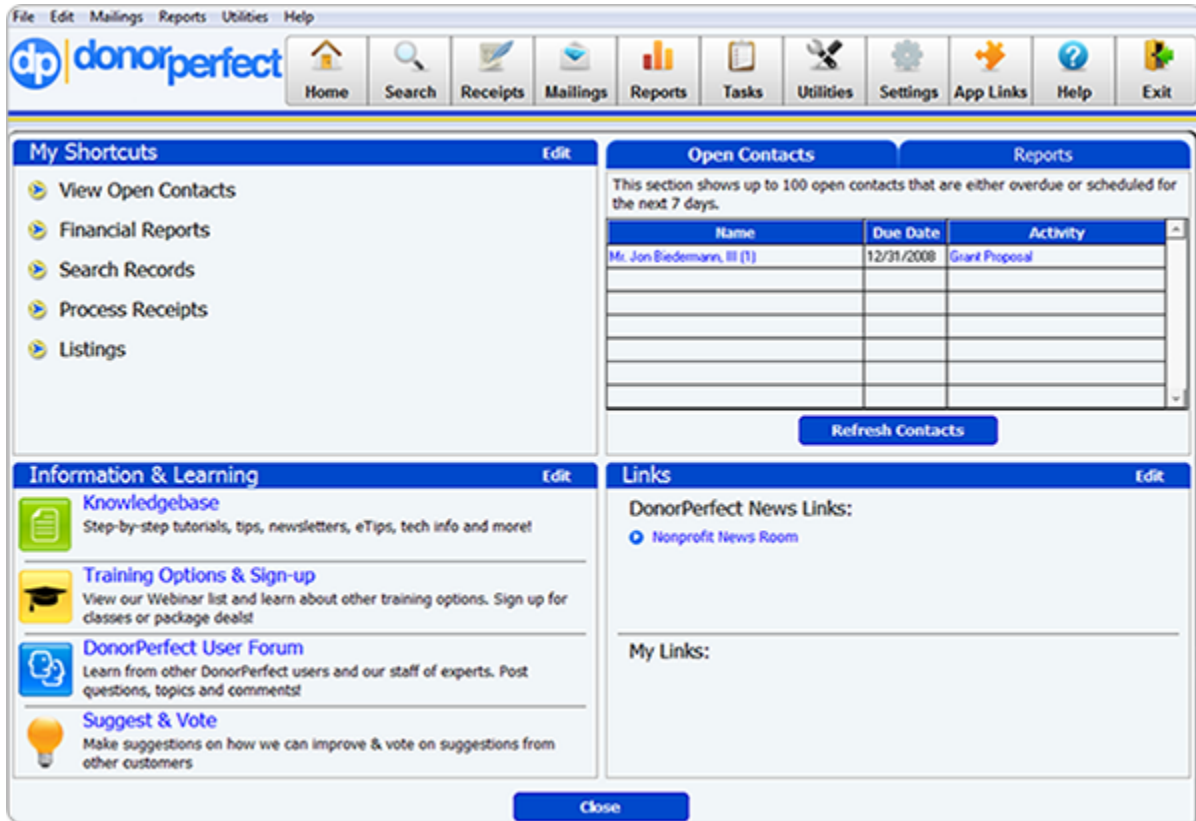
*The user interface has been extensively upgraded for Version 11. The new user interface is designed to lighten up the application and modernize its appearance. We believe these enhancements will provide the tools to make DonorPerfect easier to use and more powerful than ever before!*

*This Highlights Guide is an overview of the latest features now available in your system. Detailed instructions for each item can also be found in the Help section of DonorPerfect.*

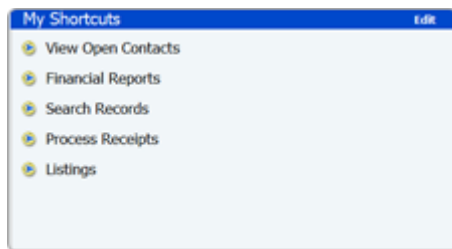
## Watch the Instructional Video

See these enhancements in action! The video will walk you through the numerous enhancements in version 11. Visit this URL to view it (login required): [www.donorperfect.com/v11Video](http://www.donorperfect.com/v11Video)

## New Welcome Screen



The Welcome Screen is now divided into four areas:



### My Shortcuts

The My Shortcuts area is an expanded version of the Shortcuts feature in DonorPerfect 10. It allows you to have up to 7 shortcuts to your most-used DonorPerfect features. The shortcuts can be customized using the *Manage Content* button at the bottom of the screen.



### Open Contacts

The Open Contacts area displays a list of all open or overdue contacts that have been assigned to you. The Open Contacts area shares this quadrant with the Reports feature, which is similar to the Favorite Reports feature of DonorPerfect 10.



## Information & Learning

The Information & Learning area displays links to other sources of information and feedback on DonorPerfect:

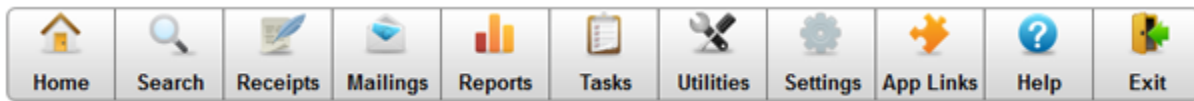
- **SofterWare Knowledgebase** - Helpful articles, tips, videos & "How to" information.
- **Training Options & Sign-up** - View our webinar list, learn about our available training options, and sign up for classes or package deals.
- **DonorPerfect User Forum** - Get in touch with other DonorPerfect users and our staff of experts
- **Suggest & Vote** - This feature allows you to provide suggestions on improvements and new features (many of these enhancements came from there.)



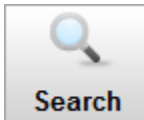
## Links

The Links area displays news links and announcements from DonorPerfect, as well as a set of website links that you can customize using the Manage Content button.

## Navigation Bar



One of the first changes you will notice when you start up DonorPerfect 11 is the new navigation bar, which is now at the top of the screen instead of along the left side. The menus in the navigation bar have also been reorganized to make things easier to find.



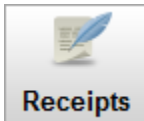
### Search

- Search Records



### Mailings

- Group Email
- Mail Merge
- Labels



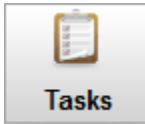
### Receipts

- Acknowledgements



## Reports

- Contact Manager
- Custom Reports
- Event Reports
- Listings
- Membership
- Error History
- Financial Reports



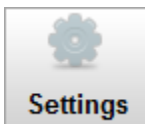
## Tasks

- Quick Gift Entry
- Pledge Processing
- Accounting Interface
- Event Management
- Moves Management
- Pre-Authorized Payments
- Constant Contact
- EFT Transactions
- Scan Gifts



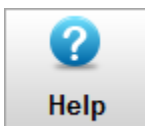
## Utilities

- Import Outlook Emails
- Import Records
- Back Up/Restore
- Duplicate Maintenance
- Initiate DonorSync
- Recalculate
- Reindex Files
- Flexible Info Generator
- Restore Deleted Record
- Run a Custom Program



## Settings

- Export Templates
- Insta-Charge/EFT Setup
- Change Parameters
- Code Maintenance
- Edit User-Defined Filters
- Screen Generator
- Change User Options
- Set Defaults



## Help

- About DonorPerfect
- DonorPerfect Functions
- DonorPerfect Website
- Keystroke Conventions
- Mouse Conventions
- Program Functions
- Edit Function Keys
- User Defined Website

## Keyword Search

The **Keyword** field allows you to search a number of different fields in a single operation. DonorPerfect will compare the search terms in the **Keyword** field to the contents of the **First Name**, **Last Name**, **Spouse** and **SecIn** (Optional Line) fields when looking up matching constituent records. You can also enter the Donor ID in the **Keyword** field.

If a search term is entered into one of the other Search Criteria fields, that term will be used to search that field instead of the **Keyword** terms. For instance, if you enter "Moe" into the **First Name** field, and "Howard" in the **Keyword** field, the system will search for records with "Moe" in the **First Name** field, and "Howard" in any of the other fields. It would turn up "Moe Howard" but also "Moe from Howard, South Dakota"

## Reports Screen

The new Reports screen for DonorPerfect 11 consolidates the Contact Manager Reports, Event Reports, Financial Reports, Listings and Membership Reports into a single screen. In addition, a new Administrative reports category has been added.

You can now select the report you want in one of two ways: browsing by type, or searching for the report by name.

## Browsing for a Report by Type

To browse for a report by type, select the type of report from the **Search by Type** list in the **Choose a Report** section in the upper left corner of the screen. The available types are:

- Administrative Reports
- Contact Manager Reports
- Event Reports
- Financial Reports
- Listings
- Membership Reports

**Choose a Report**

**Search by Type:** Event Reports ▼

**Report Category:** All Event Reports ▼

**Report Name:** Attendee Name Tags [Tables/Teams] ▼

Depending on the report type selected, a Report Category list may appear under the Search by Type list. When present, this list allows you to select various sub-categories of reports within the selected type.

After selecting Type and possibly Category, you can then select the report from the Report Name list. A preview image and description of the selected report will appear on the right side of the screen:

The screenshot shows the DonorPerfect Reports interface. On the left, the 'Choose a Report' panel is active, showing 'Search by Type' set to 'Event Reports', 'Report Category' set to 'All Event Reports', and 'Report Name' set to 'Attendee Name Tags [Tables/Teams]'. Below this are sections for 'Report Settings' (with checkboxes for 'Include Title in Guest Name', 'All Active Events', and 'Hide Inactive Events'), 'Event' selection (with 'Better Business 2013 Int' and 'Spring Fling 2012' selected), and 'User Filter Criteria' (with 'Set Selection Filter ...', 'Clear User Filter Criteria', and 'Manage Fields' options). At the bottom of the left panel are 'Run Report', 'Print', and 'Close' buttons.

The main area on the right displays a preview of the report. The 'Report Heading' is empty. The preview shows a table with two columns of guest names and table numbers:

ABC Corporation Seth Jones	Guest 1 of George Judson
Guest 2 of George Judson	Guest 3 of George Judson
Table 2	Table 2
Guest of Leah Zimmerman	Guest of Leah Zimmerman
Table 1	Table 1
HG Wells	Guest 1 of HG Wells
Guest 2 of HG Wells	Guest 3 of HG Wells

At the bottom of the preview area, there is a note: "Attendee Name Tags can be printed for attendees of any particular event."

Clicking on the preview image will display a larger preview image.

## Searching for a Report by Name

To search for a report by name, type all or part of the report name into the **Search by Name** field and click the **Search** button. A list of search results appears:

**Choose a Report**

**Search by Type:** -- Select Report Type -- ▼

**Search by Name:**

**Select Report**

Gift Listing with Soft Credits	Fundraising Reports
Gift/Pledge Report	Pledge Reports
Gift/Pledge Transactions	Export to File

Select the report you want to run from the **Select Report** list, and click the **Select Report** button.



DonorPerfect Reports

**Choose a Report**

Search by Type: Financial Reports

Report Category: Solicitation Reports

Report Name: Campaign Analysis

**Report Settings**

Date Range: 07/01/2013 - 08/27/2013

**User Filter Criteria**

Set Selection Filter ...

[Clear User Filter Criteria](#) [Manage Fields](#)

**Main**

Cal. Yr. Totals - 2013

Company in Lname?

Flags

Last Date Given

Type of Record

**Address**

**Options**

Do Not Show Donor Information if Anonymous

## Selecting Report Settings and Options

Once you have selected a report, the report settings and options will appear in the area on the left side of the screen:

The **Report Settings** area contains the report options for the selected report.

The **User Filter Criteria** area allows you to set a selection filter. You can also enter selection criteria directly into the fields in this section.

The **Clear All** link clears out the contents of all fields in the **User Filter Criteria** area. The **Manage Fields** link allows you to select which fields appear in this area.

See [SideBar Reporting](#) below for more info on this exciting new feature!

The **Options** area contains additional options for reports, such as the **Do Not Show Donor Information if Anonymous** option.

## Previewing and Printing a Report

To preview a report, click the **Run Report** button in the lower left corner of the screen.

To print a report, click the **Print** button in the lower left corner of the screen.

## SideBar Reporting

What if you could take something you do at work every day, and produce better results in 1/5th the time? That's what SideBar Reporting can do for you – it makes building selection filters easy and efficient!

Similar to travel websites, it enables you to change parameters on the fly to quickly view new information. You can enter filter criteria, view the report, and refresh the report with different criteria without ever leaving the report screen!

### Can I Customize the SideBar?

Of course! Click on the **Manage Fields** link in the **User Filter Criteria** area to select which selection filter fields appear in the SideBar.

## How do I Output a Report?

Go to the bottom left corner of the screen, and click the **Run Report** button to preview the report in DonorPerfect, or click the **Print** button to print the report.

## Is There Any Limit to the Fields that I Can Add to the SideBar?

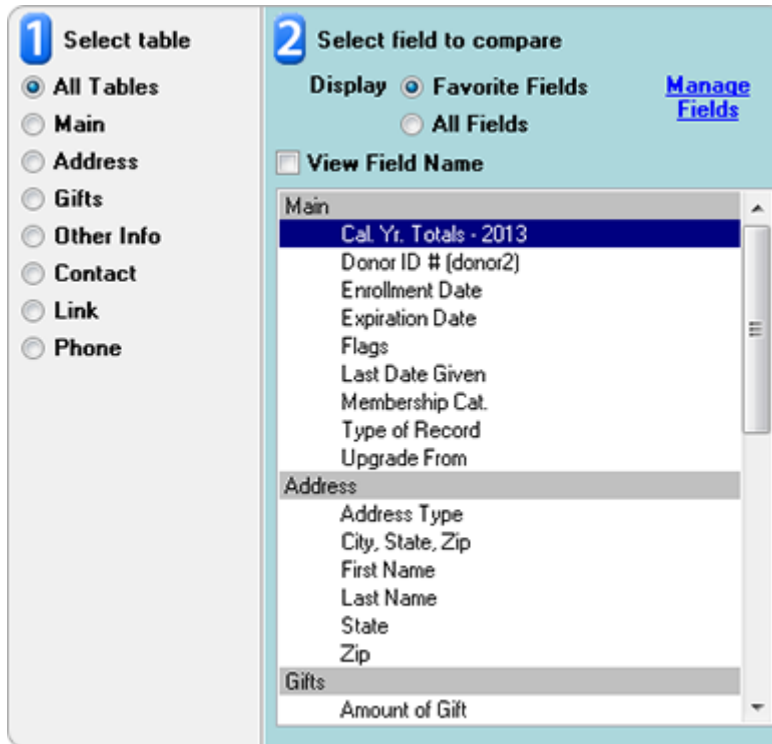
No, you can add as many **User Filter Criteria** fields to the SideBar as you like.

## Which Reports Use the SideBar?

Every report uses the SideBar, except for Custom Reports and School Reports.

## Favorite Fields

The **Favorite Fields** list appears in the **Step 2** area of the DonorPerfect Selection Screen. It displays a list of the most commonly used fields from the tables selected in **Step 1**. It is faster to find the fields you want in the **Favorite Fields** list, because the number of fields in the list is considerably smaller.



The screenshot shows a two-step selection process:

- Step 1: Select table**
  - All Tables
  - Main
  - Address
  - Gifts
  - Other Info
  - Contact
  - Link
  - Phone
- Step 2: Select field to compare**
  - Display:  Favorite Fields [Manage Fields](#)
  - All Fields
  - View Field Name
  - Fields list:
    - Main
      - Cal. Yr. Totals - 2013
      - Donor ID # (donor2)
      - Enrollment Date
      - Expiration Date
      - Flags
      - Last Date Given
      - Membership Cat.
      - Type of Record
      - Upgrade From
    - Address
      - Address Type
      - City, State, Zip
      - First Name
      - Last Name
      - State
      - Zip
    - Gifts
      - Amount of Gift

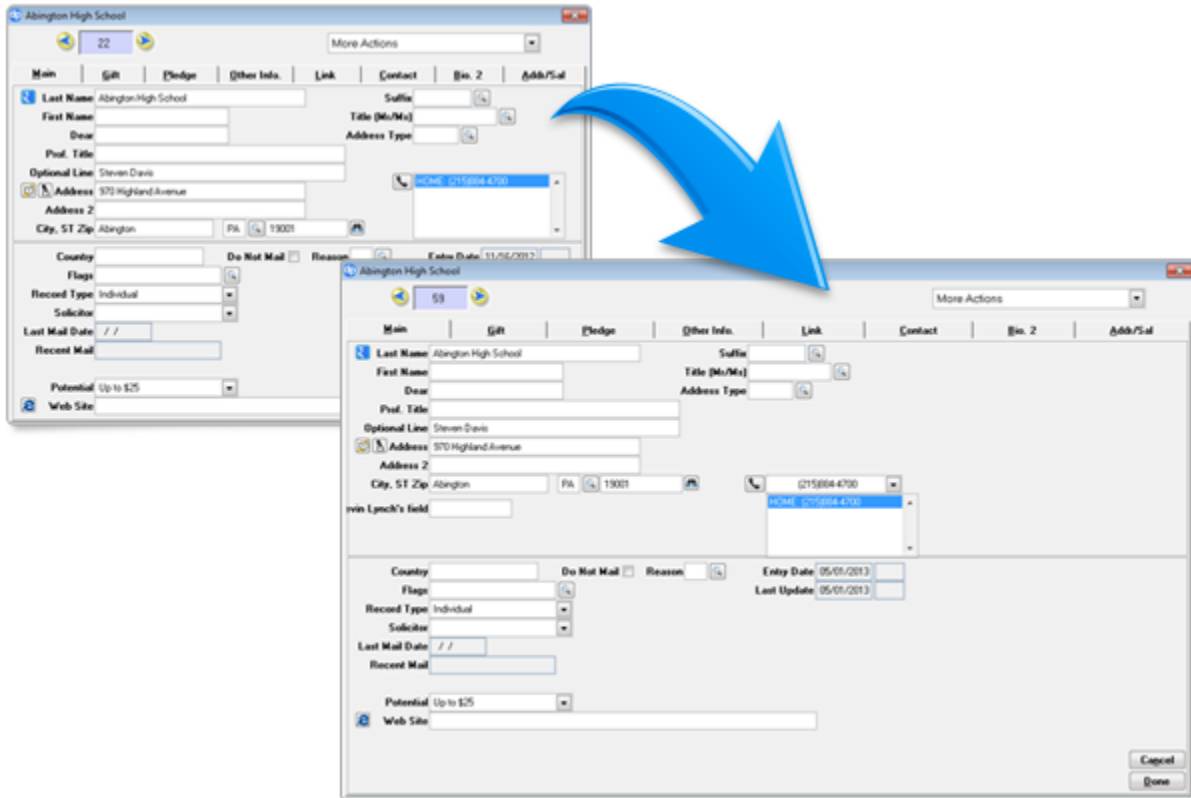
If desired, you can click on the **Manage Fields** link to select which fields appear in the **Favorite Fields** list.

You can also select the **All Fields** option to display all of the fields in the selected tables instead.

## Data Entry Screen Improvements

### Increasing the Size of the Main Entry Screen

A new feature on the Entry Screen Parameters screen allows you to increase the size of the main entry screen from 800x600 pixels to 1024x768.



## Screen Designer Update

The Screen Designer now features a Position button that allows users to select the position for fields on the screen by pointing and clicking on an image of the actual screen. This takes all the guesswork out of choosing Row and Column positions for a field!

To use the new positioning feature, edit a field in Screen Designer, then click on the Position button. A WYSIWYG view of the screen appears:

Mr. Jon Biedermann

Main | Gift | Eledge | Other Info | Link | Contact | Bio. 2 | Add/Val

Last Name: Biedermann Suffix: [ ] [R]  
 First Name: Jon Title (Mr/Ms): Mr. [R]  
 Dear: [ ] Address Type: HOME [R]  
 Prof. Title: Vice President  
 Optional Line: Software, Inc.  
 Address: 132 Welsh Rd  
 Address 2: Suite 110  
 City, ST Zip: Norham PA 15044 [R] [R] Phone: 8002208111 [R]  
 My Field: [Hatched Box] [R]  
 Country: USA Do Not Mail: [X] Reason: NM [R] Entry Date: 11/09/1999 FDC  
 Flag: 00-VL [R] Last Update: 02/06/2013  
 Record Type: Individual  
 Solicitor: [ ]  
 Last Mail Date: 03/06/2006  
 Recent Mail: NL03  
 Potential: Over \$5000  
 Web Site: www.donorperfect.com

Use the mouse, arrow keys, or enter the row and column to position the crosshairs. Click "?" for more info.  
 Click "Set Position" to view the new position. Click "Done" to return to the editor.

Row: 178 Column: 90 [Set Position] [Done]



The current position of the field is indicated with a box filled with diagonal lines.

To choose a new position for the field, simply click on the screen. A crosshairs will appear indicating the position of the upper left corner of the field:

Click the **Set Position** button to move the field to the newly selected position.

Click the Done button when you are finished selecting the position!