idealware

DETAILED REVIEWS OF
LOW COST DONOR MANAGEMENT SYSTEMS

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INTRODUCTION

A donor management system can be instrumental to a nonprofit organization. It can help you manage information about donors and gifts so you can understand how much you've raised, keep track of all the useful information you know about your donors, manage mailings, emails and campaigns, and print reports on all this information.

But what systems are best for what kinds of organizations? Idealware and NTEN took a look at 33 lower-cost systems (defined as costing under $4,250 for the first year). In our Consumers Guide to Low Cost Donor Management Systems report, the companion report to this one, we provided summaries of all those systems, with recommendations for the types of situations where they would shine. Based on our summary reviews of all the systems, we chose a set of systems to review in much more detail—those systems are the focus of this report.

In our Consumers Guide to Low Cost Donor Management Systems report, the companion report to this one, we provide summaries of 33 systems. Here, we review 12 in much more detail.

For us, they offer the best combination of functionality, price and attractiveness in a variety of situations. In selecting them we prioritized functionality to manage complex gift and donor information and to issue printed acknowledgement letters, but also considered usability, querying and reporting, configurability, managing constituent data beyond donations, and price.

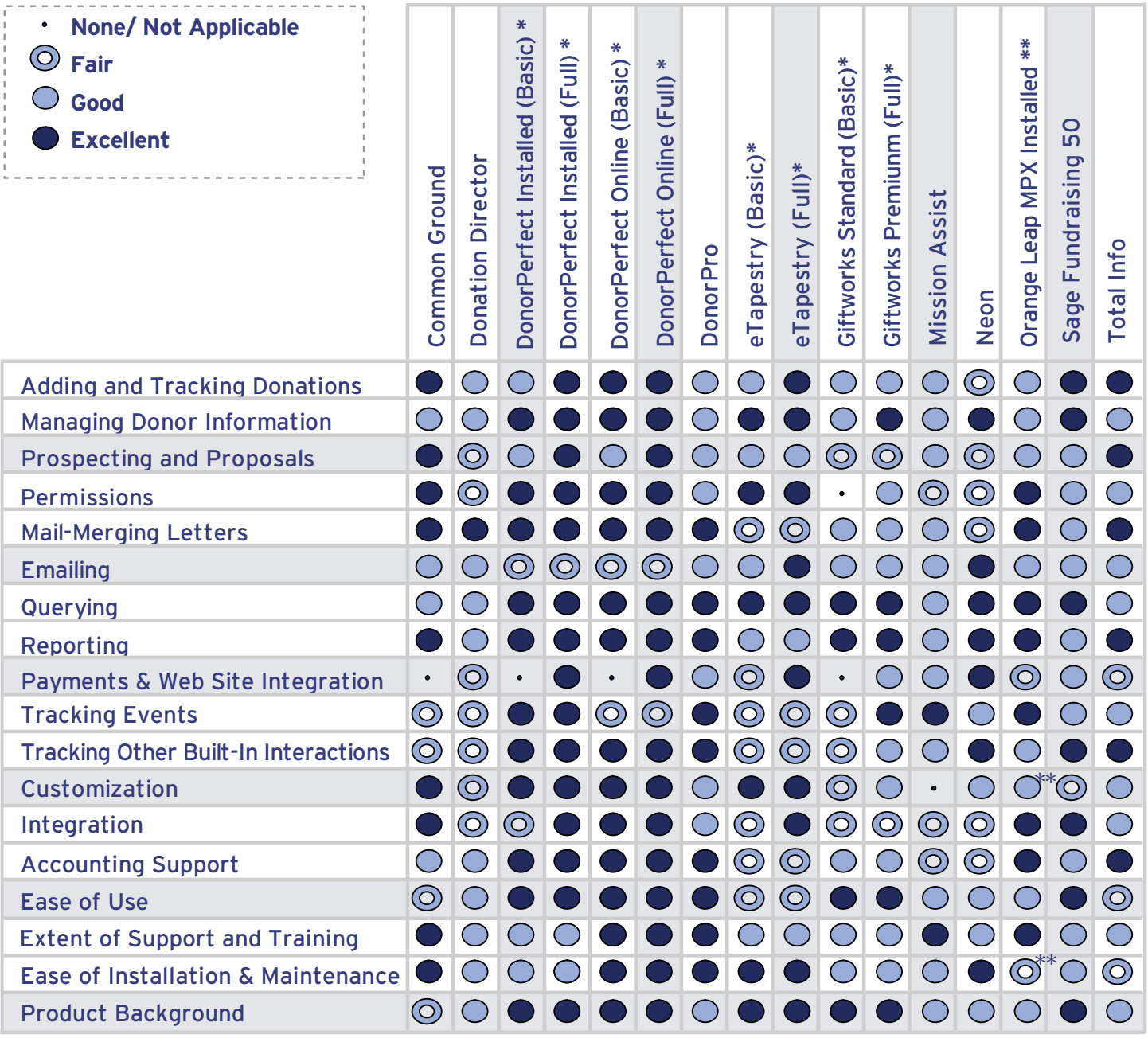
Our Consumers Guide compares the top 10 systems. But in fact, we initially conducted detailed evaluations of 12. When we finished the reviews, we dropped two that we weren't confident would be any more useful to nonprofits than other systems, but since we still had a lot of detail about them we included them here—in other words, you'll find two bonus reviews in this report.

We start with a summary matrix that compares all the systems, then quickly delve into detail. The vast majority of this document is dedicated to providing the details for each system based on 127 criteria. We also do an apples-to-apples comparison of features as a reference to help you understand what each system offers.

Of course, no report can provide all the information you need to make an effective software choice. You'll need to think carefully through your own needs, define your own priorities and see the software for yourself. But this report offers you a headstart to help you define which systems might be most useful for you.

THE FEATURE MATRIX

To help you compare, we've compiled the ratings for each system and category into a comparison matrix. See the next page for pricing information for these systems.



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

** Orange Leap MPX also offers a hosted version. The ratings for it are identical except it received a Fair in Customization and an Excellent in Ease of Installation and Maintenance.

THE PRICING MATRIX

This matrix summarizes the list cost for each of our top 10 systems. Note that some vendors routinely discount from the list cost, particularly if you're buying a lot of extra modules or consulting services. It's always worth getting an estimate directly from the vendor.

	One User, 900 Donors		Three Users, 20,000 Donors	
	First Year	Yearly Ongoing + Email Support	First Year	Yearly Ongoing + Email Support
Common Ground	$2400	$2400	$3600	$3600
Donation Director	$1599	$299	$1999	$499
DonorPerfect Installed (Basic) *	$2995	$725	$5540	$825
DonorPerfect Installed (Full) *	$5000 - $6000	$1205	$7900+	$1305
DonorPerfect Online (Basic) *	$720	$1200	$4008	$4704
DonorPerfect Online (Full) *	$2000 - $3000	$2400 - $3600	$5000 - $6000	$6000 - $7000
DonorPro	$3480	$1980	$4620	$3120
eTapestry (Basic)*	$444	$774	$4032	$4866
eTapestry (Full)*	~$3000	~$3000	~$7250	~$7250
Giftworks Standard (Basic)*	$399	$0	$1197	$0
Giftworks Premiunm (Full)*	$1346	$0	$4038	$0
Mission Assist	$1495	$250	$2495	$500
Neon	$859	$540	$3939	$2820
Orange Leap MPX Installed	$0	$1188	$0	$3564
Orange Leap MPX Hosted	$1668	$1668	$5064	$5064
Sage Fundraising 50	$3400	$850	$5900	$1475
Total Info	$695	$240	$2095	$240

* **Basic** referrs to the cheapest version of the system you can buy; **Full** to the version with all relevant modules and upgrades.

COMMON GROUND CRM
BY CONVIO

www.convio.com/crm

Convio, a large vendor with a lot of nonprofit experience, recently launched Common Ground as a hosted donor management product built on top of the Force.com platform (as in Salesforce.com). This option will interest many nonprofits. Convio added substantial donor-specific functionality without changing Salesforce's extremely flexible nature. The resulting product has strong support for gift entry and tracking, integrated receipting, mail-merging, emailing, householding and a substantial number of useful standard reports. It has no built-in support for payment processing (online or offline), or for events or volunteer tracking—although the vendor reports that both of the latter are coming in June 2009. However, it's very customizable, and as you can also take advantage of the many add-ons built for Salesforce.com via the AppExchange (most at additional cost), there are many opportunities for your technical staff or consultant to extend the system. The interface is reasonably laid-out, but complex, and most users will require training. Pricing is based solely on the number of people using the system, starting at $2,400 per year for two users, including support. Additional users are $1,200 per year each.

The Basics

- **Technical Setup**: Online service hosted by Salesforce.com and supported by Convio.
- **Pricing**: Pricing is based solely on the number of people using the system, starting at $2,400 per year for two users. Additional users are $1,200 per year each. Support is included at no additional charge.

Adding and Tracking Donations: **Excellent**

- **Quick Search**: Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches any one field in the database, or across all fields. The search results are categorized by groups—for instance, households, organizations, people, tasks.
- **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 and a few other common fields.
- **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, donations may be entered as part of a batch or associated with a batch after entry by adding it to an existing batch or giving it a new batch number. Gifts do not have to be batched.
- **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. Gifts can be entered into a spreadsheet and easily imported as an alternative.
- **Updating Donor Info via Quick Entry**: The 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.
- **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**: Can flexibly configure the system to notify the appropriate staff member(s) with a reminder or email when a pledge is near due.

- **Matching Gifts**: Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry. This tracks the matching amount and whether the match has been paid.
- **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 (called "Designation"). You can split the gift across multiple designations, but not sources or campaigns.
- **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. You can also automate the soft crediting process—to say, for instance, that John Smith always gets credit when a specific donor makes a gift.
- **Gift Notes**: Lets you add freeform notes to a gift.
- **Organizational Gifts**: Lets you associate gifts with an organization as opposed to individuals.

Managing Donor Information: **Good**

- **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. It is possible to set up functionality to automatically switch the primary address for the appropriate timeframe, but the system does not do so out of the box.
- **Do Not Contact**: Lets you mark that a particular person should not be contacted, but staff must check a particular field to see it
- **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"). The system automatically creates the relationship for the linked donor if the relationship is a simple two-way one (spouse), but not for a directional relationship ("boss; works for")—to do that, you must manually define the relationship for both donors.
- **Viewing Relationships**: Lets you easily view everyone with whom a donor has relationships.
- **Householding**: A database record describes an entire household; individuals within that household are listed on that record with all of their contact info and actions.
- **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 freeform notes about donors, but it's difficult to enter and view a large quantity of notes, as the notes field is not very big.
- **Manual Communication Log**: Lets you keep a manual log of communications such as phone calls or personal meetings, through either a call log or tasks.
- **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.
- **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.

Prospecting and Proposals: **Excellent**

- **Prospecting Workflow**: Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You can also create a "Cause" in the system that links multiple solicitors and multiple prospects together for tracking and reporting purposes, or flexibly build a number of custom features to support various workflows.
- **Ticklers**: Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on the homepage along with what is overdue, due and other filters.

- **Creating Ticklers for Others**: Lets you create a reminder for someone else to do a task on a particular date.
- **Donor Research**: Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority. The system does, however, help you analyze the giving history of past prospects compared to your estimates in order to project the likelihood of future giving for each of your user-defined stages.
- **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 running a segmentation report.
- **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.

Permissions: **Excellent**

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

Mail-Merging Letters: **Excellent**

- **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: Cannot automatically mail merge letters on a Mac (running Office on OSX) due to reliance on Windows-based ActiveX technology. However, 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 when you confirm that a batch of letters were printed.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift-entry interface by choosing from a number of letter templates.
- **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. Alternatively, you can query to find all those who need to be thanked (for example, by finding recent donors who have not yet been thanked), and create letters for them all 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: **Good**

- **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). However, you cannot send more than 1,000 emails per day.
- **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.
- **Email Server**: Emails are sent through the vendor's email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors' inboxes rather than their Spam filters. However, you cannot send more than 1,000 emails per day.
- **Unsubscribes**: Donors must contact the organization to unsubscribe from emails.
- **Email Reports**: Lets you see open rates but not click-through numbers.
- **Automatic Emails**: Lets you set up automatic emails based on certain events called "workflows".

Querying: **Good**

- **General Querying Approach**: Lets you create powerful queries, but the interface to do this is less intuitive than some other tools. Queries require a number of steps and multiple screens, which is necessary to handle the huge amount of field possibilities in the system but nevertheless requires substantial practice to learn. Queries are quite integrated into reporting; reports are the output of queries.
- **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".
- **Expanding Queries**: Lets you easily limit or expand a query after you've generated the list by saving the query and editing it again.
- **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 any field in the database for the list, or export the list.

Reporting: **Excellent**

- **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 in one report, including the donations compared to the cost of the campaigns. However, this report requires advanced skills in using the report functionality.
- **Reporting on Pledges**: Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts. It includes a report to compare your past projections to actual performance, to judge the historical effectiveness of your projections.
- **Ad-hoc Reports**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting and grouping, but not a logo, header or other look/feel enhancements.
- **Custom Fields in Ad-hoc Reports**: Custom fields can be displayed within ad-hoc reports.
- **Saving Reports**: Lets you save reports that you create or modify. You can also schedule delivery of reports.
- **List of Favorite Reports**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Exporting Reports**: Lets you export reports to Excel or CSV formats, among others.

Payment and Web Site Integration: **None/ Not Applicable**

- **Processing Credit Cards**: Does not provide any functionality to charge credit cards, on- or offline.
- **Recurring Gifts**: Lets you set up recurring gifts that are logged to the record at designated intervals, but they must be charged to donors' credit cards outside the system.
- **Web Sign-up Form**: Does not provide an out-of-the-box way for people to sign up for your email list from your Web site. However, there's an API that a programmer could use to integrate a Web form with the system.
- **Online Payments**: Does not include any integrated online payment functionality. Using the API or App Exchange functionality, an experienced technologist could add this functionality. If you use Convio's online marketing products, the data you collect is pulled automatically from there into Common Ground (however, these online marketing products are priced well beyond the threshold for this report).

Tracking Events: **Fair**

- **Event Registrants**: Does not provide any specific event functionality. Some details could be tracked through custom fields, but this functionality is not robust.
- **Tracking Guests**: Cannot distinguish non-paying guests for an event from those that paid, except by using custom fields.
- **Table Details**: Cannot manage any table details for an event, such as names of table captains, seating arrangements or the amount of gifts raised per table, except by using custom fields.
- **Nametags**: Lets you create nametags for an event via a standard mail merge process.
- **On-Site Registration**: Does not provide any specific functionality to support on-site registration.

Tracking Other Built-In Interactions: **Fair**

- **Volunteer Interests**: Does not provide any specific functionality to track interests in order to match volunteers with jobs, although this could be created through custom fields.
- **Volunteer Work Tracking**: Cannot log any details about specific hours and tasks for volunteers, except by using custom fields.
- **Membership Tracking**: Does not provide any specific functionality to track member levels, payments and expiration dates, except through custom fields.
- **Other Built-In Interactions**: Does not provide built-in support for any constituent interactions other than what has been covered in this report.

Customization: **Excellent**

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.
- **Custom Fields**: Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields**: Lets you rename existing fields.
- **Moving or Deleting Fields**: Lets you move some fields within the interface, or delete them altogether.
- **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). However, you'll need someone fairly technically savvy to set them up.
- **Vendor Customization**: While the vendor does not provide customization services, the system is extensively customizable by any qualified person. Vendor can refer you to one of many consultants who specialize in configuring systems based on the Salesforce.com platform.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality. However, an extensive API allows tremendous access to underlying data and application structure for modifying the system and developing new functionality.

Integration: **Excellent**

- **Existing Integrations**: Can automatically exchange data with many external systems, via the applications available in the Salesforce.com App Exchange. You'll need someone with moderate-to-significant technical skills to set these up.
- **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.
- **Programmatic Integration**: Provides an API to allow a programmer to create custom data feeds to an external system.

Accounting Support: **Good**

- **Existing Integrations**: While Convio does not specially support any existing integrations with accounting systems, the Salesforce.com platform on which Common Ground is built offers a number of third party integrations with various accounting systems.
- **Approach to Batching**: You can make and post batches in order to ease the reconciliation process with an accounting system. You would typically manually compare reports from Common Ground and your accounting package to reconcile.
- **Reconciling a Batch**: Cannot mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations**: There are no controls in place to prevent someone from editing a payment that has already been reconciled, thus throwing the system out of balance with the accounting system.

Ease of Use: **Fair**

- **Ease of Use for Novices**: Complex. The system is powerful but complicated. Most users will require training.
- **Speed for Expert Users**: Moderate. The system is well organized once you learn it, but many tasks require a fair amount of steps and different pages, making it not the fastest system for data entry and other repetitive tasks.

Support and Training: **Excellent**

- **Training**: Vendor provides initial training via the Internet at no additional cost, and additional training sessions can be scheduled at additional cost.
- **Manuals and Documentation**: Provides help text throughout the application, as well as a manual and recorded trainings.
- **Support**: Vendor provides unlimited phone or email support without additional cost.

Installation and Maintenance: **Excellent**

- **Installation and Maintenance**: 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: **Fair**

- **History**: Vendor has been in business since 1999; Convio Common Ground package has been in use by clients since July 2008. The system was built on the Force.com platform, which has been in use since 1999.
- **Clients**: Vendor reports about 150-plus clients for this particular package.
- **Sustainability**: The vendor declines to disclose whether or not the revenue earned from this donor management system covers the personnel and operational expenses required to support it. Please contact Convio directly for financial information.
- **Roadmap**: Convio plans to deploy three major releases of new functionality each year. The June 2009 release will include solutions for Volunteer and Event management, as well as new features for duplicate management and household salutations.

DONATION DIRECTOR
BY CASCADE DATA SOLUTIONS

www.donationdirector.com

Donation Director provides useful and affordable support for donor management needs. Features to track gifts and donor information, mail merge, email, query, integrate with other systems and create reports (including ad-hoc reports) are all reasonably strong, although not the strongest among the systems reviewed in any of these areas. The interface is not highly polished, but it's reasonably usable, and it makes it easy to get either a brief look at or detailed information for a donor. It provides functionality to process credit cards in the system, but no support for Web site integration or online payments, and little support for other constituent interactions like events, volunteering or membership. Strong accounting controls provide a level of rigor that some organizations will welcome, but may be more than what others want. The system is affordably priced for what it offers, at $1,599 for a single user or a flat $1,999 fee for up to five user accounts. The purchase cost includes not only support but unlimited training for the first year, an unusual perk; after that, support and maintenance is $299 per year for a single user or $499 for up to five users.

The Basics

- **Technical Setup**: Installed onto PC desktop computers.
- **Pricing**: The system is $1,599 for a single user, $1,999 for up to five user accounts, and $150 for each additional account after that. The first year of support is included; after that support and maintenance is $299 per year for a single user, $499 for up to five users and $50 for each user after that.

Adding and Tracking Donations: **Good**

- **Quick Search**: Lets you search the database for an existing person using a form that searches name, contact and various other fields, but only on the transaction entry screens, or by opening the form from the menu.
- **Quick Search on Custom Fields**: Cannot find a person by searching data entered into custom fields.
- **De-duping**: You are required to do a search before adding a new donor record, and you can merge duplicates if you find them, but the system does not proactively prompt you with a list of existing people with same name upon entering a gift to prevent duplicate entries.
- **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 entered as part of a defined batch. You first create a new batch, then add the gifts.
- **Gift Quick-Entry Interface**: Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface; however, this interface can not be tailored on the fly with the appropriate fields and defaults for a particular set of gifts.
- **Updating Donor Info via Quick Entry**: The 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, but this requires an add-on module for $300.
- **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, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so.
- **Reminders for Pledges**: Lets you run a report to see pledges that are near due, but staff members are not proactively notified.

- **Matching Gifts**: Cannot easily track matching gifts that need to be claimed from employers. Matching gifts can be tracked as a soft credit, but you cannot track the match amount or distinguish matching gifts as a category.
- **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, category, campaign, designation or fund, or split the gift across multiple of these.
- **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 freeform notes to a gift.
- **Organizational Gifts**: Lets you associate gifts with an organization as opposed to individuals.

Understanding Donor Information and Background: **Good**

- **Multiple Contact Methods**: Lets you track up to 10 addresses and as many phone numbers and email 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. Effective dates are specified in months, as opposed to an actual calendar day.
- **Do Not Contact**: Lets you mark that a particular person should not be contacted, but staff must check a particular field to see it.
- **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"). The system automatically creates the relationship for the linked donor if the relationship is a simple two-way one (spouse), but not for a directional relationship ("boss; works for")—to do that, you must manually define the relationship for both donors.
- **Viewing Relationships**: Lets you easily view everyone with whom a donor has relationships.
- **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 choose to mail or email one or more individuals in a household.
- **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 freeform notes about donors, but it's difficult to enter and view a large quantity of notes, as the notes field is not very large.
- **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 that there has been recent activity or communications with a donor, but this information is not grouped together in one page.
- **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.

Prospecting and Proposals: **Fair**

- **Prospecting Workflow**: Lets you assign either a priority or a stage to a donor in order to manage a prospecting workflow, but you cannot easily track both at the same time. You could alternatively use system's "Demography Groups" function, which allows you to create categories and subcategories with associated dates. For instance, you could define prospect and priorities categories, and track those with or without dates—but this requires some strategy and setup.

- **Ticklers**: Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on opening screen.
- **Creating Ticklers for Others**: Lets you create a reminder for someone else to do a task on a particular date
- **Donor Research**: Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority.
- **Reporting on Asks**: Cannot easily create reports that show all the asks that have been made. You could label "Journal Notes" or "Call Reports" as an "ask" and then report on the number of asks being made and who was asked.
- **Finding Your Prospects**: Lets you easily see the list of donors assigned to you as a solicitor by generating a segmentation. You can track primary and secondary solicitors, as well as solicitor teams.
- **Proposal Tracking**: Lets you track what proposals are due, what you've submitted and what has already been approved by a particular foundation. However, this must be configured by the user, and will require some time and effort to learn.
- **Foundation Interest Tracking**: Cannot track a particular foundation's interest areas based on your organization's custom categories of interest except through custom fields.

Permissions: **Fair**

- **Permissions**: You can grant individuals access to certain large areas of system information, such as a module, and can control access to specific financial information, but you cannot control permissions at a more detailed level than that.
- **Field-Level Permissions**: Cannot define user or group permissions on a field-by-field basis.

Mail-Merging Letters: **Excellent**

- **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 Word templates through the system, without the need to export data.
- **Mail-Merging on a Mac**: Cannot mail merge letters on a Mac, as this is a PC-based system.
- **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 when you confirm that a batch of letters were printed.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift-entry interface by choosing from a wide variety of letter templates (including default templates per appeal, per pledge and more).
- **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**: Automatically asks if you'd like to print labels for each letter printed.

Emailing: **Good**

- **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**: Cannot 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**: Cannot schedule email to send in the future.
- **Email Server**: Emails are sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted. You are required to run Microsoft Outlook in order to send email through the system.
- **Unsubscribes**: Donors must contact the organization to unsubscribe from emails.
- **Email Reports**: Does not provide any reports to help you understand how many opens or clicks an email generated.
- **Automatic Emails**: Cannot set up automatic emails based on certain events, like a Web form submission.

Querying: **Good**

- **General Querying Approach**: Lets you create powerful queries, but the interface to do this is less intuitive than some other tools. The language used is in places technical or requires substantial fundraising background to understand. Most users will require training.
- **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".
- **Expanding Queries**: Lets you easily limit or expand a query after you've generated the list by saving the query and editing it again.
- **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 any field in the database for the list or export the list.

Reporting: **Good**

- **Standard Reports**: Lets you easily generate prepackaged reports, including top donors for a particular time frame, or donors by level or stage. System doesn't automatically offer reports to see donors from Last Year but Unfortunately Not This one (LYBUNT) or donors from Some Year but Unfortunately Not This one (SYBUNT), but will create them on installation at no additional cost.
- **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 see success metrics for a particular campaign, including the donations compared to the cost of the campaign. You can easily compare a campaign from one year to the next, or appeals within the same campaign, but would need to create a custom report to compare different campaigns.
- **Reporting on Pledges**: Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad-hoc Reports**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting and grouping, but not a logo, header or other look/feel enhancements.
- **Custom Fields in Ad-hoc Reports**: Custom fields can be displayed within ad-hoc reports.
- **Saving Reports**: Lets you save reports that you create or modify.
- **List of Favorite Reports**: Cannot quickly view favorite reports without navigating a much larger set.
- **Exporting Reports**: Lets you export reports to PDF, HTML or Excel.

Payment and Web Site Integration: **Fair**

- **Processing Credit Cards**: Lets you charge donors' credit cards within the system with an optional module, at additional charge.
- **Recurring Gifts**: Lets you set up recurring gifts which are both logged and charged to donors' credit cards at designated intervals. You need to manually kick off the process to run the credit cards for the batch, but this is straightforward.
- **Web Sign-up Form**: Does not provide a way for people to sign up for your email list from your Web site.
- **Online Payments**: Does not offer any integrated online payment functionality. System will help you create an import routine to easily import a file containing online payments into your database, but this is not automatic.

Tracking Events: **Fair**

- **Event Registrants**: Does not provide any specific event functionality. A few details could be tracked through custom fields, but this functionality is not robust.
- **Tracking Guests**: Cannot distinguish non-paying guests for an event from those that paid, except by using custom fields.
- **Table Details**: Cannot manage any table details, except limited details using custom fields.
- **Nametags**: Lets you mail merge nametags via a standard merge process if you are tracking registration in a custom field.
- **On-Site Registration**: Does not provide any specific functionality to support on-site registration.

Tracking Other Built-In Interactions: **Fair**

- **Volunteer Interests**: Does not provide any specific functionality to track interests in order to match volunteers with jobs, although this could be created through custom fields.
- **Volunteer Work Tracking**: Cannot log any details about specific hours and tasks for volunteers, except by using custom fields.
- **Membership Tracking**: Does not provide any specific functionality to track member levels, payments and expiration dates, except through custom fields.
- **Other Built-In Interactions**: Does not provide built-in support for any constituent interactions other than what has been covered in this report.

Customization: **Fair**

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.
- **Custom Fields**: Lets you add unlimited date or note fields and up to five custom number, text or list fields on the donor screen. You can also add three custom fields on the gift-entry screen.
- **Renaming Fields**: Cannot rename existing fields.
- **Moving or Deleting Fields**: Cannot move or delete existing fields.
- **Custom Constituent Interactions**: Lets you create very basic custom interactions that can each track a group and a date, with Demography Groups functionality.
- **Vendor Customization**: Vendor does not typically customize the code and the interface of the system to your needs.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration: **Good**

- **Existing Integrations**: Can automatically exchange data with X-Charge payment processor.
- **Data Export**: Lets you export all data visible to users into PDF, HTML or Excel.
- **Data Import**: Lets you map different files of donor and gift information to the proper fields in the system, and import the data. This requires an additional module for $300.
- **Programmatic Integration**: Does not allow a programmer to create custom data feeds to an external system.

Accounting Support: **Fair**

- **Existing Integrations**: Lets you automatically export data to QuickBooks (at an additional cost of $300 for this module).
- **Approach to Batching**: Lets you create batches of payments in order to ease the reconciliation process with an accounting system. The "Chart of Accounts" report helps with QuickBooks reconciliation.
- **Reconciling a Batch**: Cannot mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations**: By default, there are no controls in place to prevent someone from editing a payment that has already been reconciled. However, you could restrict the group of people who can edit reconciled donations using the permissions functionality. If you are using the optional interface for QuickBooks, changes will automatically create adjustments that will show up in QuickBooks.

Ease of Use: **Good**

- **Ease of Use for Novices**: Moderate. The layout is well organized and generally fairly understandable. The query and report generator is more complex, however, and will require some practice.
- **Speed for Expert Users**: Moderate. While there are a few functionalities provided to speed repetitive tasks and work for those with experience with the system, some tasks require a fair amount of steps and pages.

Support and Training: **Good**

- **Training**: Vendor provides unlimited training via the Internet at no additional cost. Also provides consulting on how to best organize information in the system to best suit the needs of the organization at no additional cost.
- **Manuals and Documentation**: Provides limited online documentation for the system.
- **Support**: Vendor provides unlimited phone or email support without additional cost for the first year. After one year, the support pack is $299 per license per year, or $499 for up to five licenses per year. Additional modules or licenses increase the support cost, typically by $50 per year for each.

Installation and Maintenance: **Good**

- **Installation and Maintenance**: 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. If desired, the vendor will remotely install the system and updates at no charge.

Product Background: **Good**

- **History**: Vendor has been in business since 1991; Donation Director has been in use by clients since 2005.
- **Clients**: Vendor reports about 130 clients for this particular package.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.

DONORPERFECT ONLINE AND INSTALLED BY SOFTERWARE INC.

www.donorperfect.com

SofterWare offers two similar but distinct systems: DonorPerfect Installed (DPI), and DonorPerfect Online (DPO). There's small functional differences between them, but for the most part they're very similar. They're both very interesting systems, with as strong functionality as any system we reviewed in gift and donor tracking, prospecting and support for accounting needs, and they are 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, but the email functionality is not very strong—you can't for instance, mail merge fields into emails. An optional module also adds strong online payment functionality. Both support volunteers and members; the Installed package also has some events functionality. The Installed version is $2,995 for a single user, $4,895 for two users and $645 for each additional user. Yearly maintenance starts at $495 per year. Support costs extra, but the vendor will work with you for free to customize the system to your needs. You'll need to pay extra to import data. The Online version starts at $360 per year for one user account and up to 500 donors. It quickly increases in price from there—for instance, 25,000 donors and three user accounts would cost about $4,000 per year. Support is extra, starting at 18 percent of the yearly fees.

The Basics

- **Technical Setup**: DonorPerfect Installed is installed onto PC desktop computers. Donor Perfect Online is an online service hosted by Donor Perfect.
- **Pricing**: Donor Perfect Installed is $2,995 for a single user, $4,895 for two users and $645 for each additional user. Yearly maintenance starts at $495 per year, and phone support can be added for $250 per year. The price for Donor Perfect Online varies greatly depending on the number of people using the system and the number of donors you store. It starts at $360 per year for one user account and up to 500 donors. It quickly increases in price from there. For instance, 25,000 donors and three user accounts would cost about $4,000 per year. Support is extra, starting at 18 percent of the yearly fees.

Adding and Tracking Donations: **Good to Excellent**

- **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 Donor Perfect Online, but requires an additional cost for Donor Perfect 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 freeform notes to a gift.
- **Organizational gifts**: Lets you associate gifts with an organization as opposed to individuals.

Managing Donor Information: **Excellent**

- **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 relationships, 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 freeform 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.

Prospecting and Proposals: **Good to Excellent**

- **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, Donor Perfect Online includes "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.

Permissions: **Excellent**

- **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: **Excellent**

- **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 Donor Perfect 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: **Fair**

- **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**: Cannot insert "mail merge" type data into emails. However, you can export data in a format to be uploaded into Constant Contact, which allows this.
- **Merging Gift Strings into Email**: Cannot send emails that include custom gift strings based on a donor's previous giving history. However, you can export data in a format to be uploaded into Constant Contact, which allows this.
- **Graphical Emails**: You cannot create graphical emails in the system. However, you can export data in a format to be uploaded into Constant Contact, which allows this.
- **Scheduling Emails**: Cannot schedule email to send in the future. However, you can export data in a format to be uploaded into Constant Contact, which allows this.
- **Email Server**: With their basic email functionality, emails are sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted.
- **Unsubscribes**: Donors must contact the organization to unsubscribe from emails.
- **Email Reports**: Does not provide any reports to help you understand how many opens or clicks an email generated.
- **Automatic Emails**: Lets you set up automatic emails based on certain events, like a Web form submission, with the optional WebLink module at additional cost.

Querying: **Excellent**

- **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 any field in the database for the list or export the list.

Reporting: **Excellent**

- **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, but you cannot see the 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. Donor Perfect Installed allows you to add a custom logo and header, but Donor Perfect 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.

Payment and Web Site Integration: **None to Excellent**

- **Processing Credit Cards**: Lets you charge donors' credit cards within the system, with an additional module at additional cost.
- **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 Web site, at additional cost, using the WebLink module.
- **Online Payments**: Lets you set up an online payment form on your Web site and pull online payments automatically into your database, at additional cost. This requires the 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 Web site.
- **Transaction Fees**: Vendor includes the first 200 transactions free, and each additional 200 transactions cost $100 (or $.50 per transaction). 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.

Tracking Events: **Fair to Excellent**

- **Event Registrants**: DonorPerfect Installed lets you track everyone who has registered for a particular event. Donor Perfect Online does not provide any specific event functionality. A few details could be tracked through custom fields, but this functionality is not robust.
- **Tracking Guests**: DonorPerfect Installed lets you track non-paying guests for particular events, and distinguish them from those who paid. Using Donor Perfect Online, you cannot distinguish non-paying guests for an event from those that paid, except by using custom fields.
- **Table Details**: DonorPerfect Installed lets you manage table details for an event, including names of table captains, seating arrangements and the amount of gifts raised per table. Using Donor Perfect Online, you cannot manage any table details, except limited details using custom fields.
- **Nametags**: DonorPerfect Installed lets you easily create nametags for an event via the standard mail-merge process. Donor Perfect Online lets you mail merge nametags via a standard merge process if you are tracking registration in a custom field.
- **On-Site Registration**: Does not provide any specific functionality to support on-site registration.

Tracking Other Built-In Interactions: **Excellent**

- **Volunteer Interests**: Lets you track one set of interests in order to match volunteers with jobs.
- **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 support for 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: **Excellent**

- **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 existing fields. However, while the custom name appears on the screen, it is not used in the database field name, making it difficult to remember what to use for mail merges.
- **Moving or Deleting Fields**: Lets you move some fields within the interface, or delete them altogether.
- **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 Donor Perfect Online if you have less than 1,000 donor records. Otherwise, the customization is $295.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration: **Fair to Excellent**

- **Existing Integrations**: Can automatically exchange data with DonorLink and 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 Donor Perfect Online, but requires an additional cost for Donor Perfect Installed.
- **Programmatic Integration**: Both Donor Perfect Online and Donor Perfect 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, Donor Perfect Online provides an API, for an additional fee of $595.

Accounting Support: **Excellent**

- **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.

Ease of Use: **Excellent**

- **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, 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: **Good to Excellent**

- **Training**: Vendor provides initial training via the Internet at no additional cost, and additional training sessions can be scheduled at additional cost. In-person trainings are also available at additional cost.
- **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 does not provide any phone or email support unless you purchase a support plan. A number of different plans and options are available, with varying hours of phone and email support. Support for Donor Perfect Installed starts at $725 per year. For Donor Perfect Online, it starts at 18 percent of your yearly fees.

Installation and Maintenance: **Good to Excellent**

- **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, connectivity to the Internet and updates.

Product Background: **Excellent**

- **History**: Vendor has been in business since 1986. Donor Perfect Installed has been in use by clients since 1986; Donor Perfect Online has been in use since 2001.
- **Clients**: Vendor reports about 8,000 clients for Donor Perfect Installed, and about 2,000 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**: The vendor reports that they will soon release an email blast utility that will be managed within DonorPerfect, as well as completely updating DonorPerfect Online with an updated look and feel.

DONORPRO
BY TOWERCARE TECHNOLOGIES

www.towercare.com

DonorPro has solid functionality in every category we reviewed. It's particularly strong in support for pledges, accounting controls, mail-merging and reporting (it includes a very nice ad-hoc report writer as well as standard reports). The visual design is not beautiful, but it's quite usable, with a particularly friendly tool for generating queries and a number of functionalities that speed up repetitive tasks like data entry. The system provides useful support for emailing, Web integration and volunteer tracking. An optional module provides support for events. In addition, the system provides functionality for human resources functions, inventory management and patient services, which will be of particular interest to those in the health and human services sector. They charge a $1,500 setup fee (plus $500 for the optional events module) up front, and then a yearly fee of $1,920 plus $0.06 per constituent, for an unlimited number of staff users. Support is included.

The Basics

- **Technical Setup**: Online service hosted by DonorPro. Alternatively, you could install the system onto your own Web server.
- **Pricing**: They charge a $1,500 setup fee (plus $500 for the optional events module) up front, and then a yearly fee of $1,920 plus $0.06 per constituent, for an unlimited number of users. Support is included.

Adding and Tracking Donations: **Good**

- **Quick Search**: Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches first name, last name, address, constituent ID, social security number, Tax ID and groups. It includes a Soundex search, so correct spelling isn't critical.
- **Quick Search on Custom Fields**: Cannot find a person by searching data entered into custom fields.
- **De-duping**: The system helps prevent duplicate entries when new people are entered by requiring you to search for a person before entering a donation.
- **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 must be entered as part of a defined batch by associating a batch name with the gift.
- **Gift Quick-Entry Interface**: Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface. The interface will automatically default many of the field values to those used for the previous gift; however, this interface cannot be tailored on the fly with the appropriate set of fields for a particular set of gifts. You can also scan checks and attach them to the gift record.
- **Updating Donor Info via Quick Entry**: The 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.
- **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, or you can manually set a reminder to be proactively notified about a pledge.

- **Matching Gifts**: Lets you track matching gifts that need to be claimed from an employer through a separate, not entirely intuitive, interface specifically to track matching gifts.
- **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. You can split the gift across multiple funds, but not sources or campaigns.
- **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 freeform notes to a gift.
- **Organizational gifts**: Lets you associate gifts with an organization as opposed to individuals.

Managing Donor Information: **Good**

- **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 mark that a particular person should not be contacted, but staff must check a particular field to see it
- **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 relationships.
- **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 relationships. These relationships are treated the same as any other, making them more difficult to segment out in a query in order to define who should or should not be mailed. However, you can check a box in the query tool to automatically create one correspondence addressed to both spouses rather than create individual letters for each.
- **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 freeform notes about donors. As the notes field is not large, it's difficult to enter a quantity of notes at one time, and you must right click View in Browser to see all the notes you've entered.
- **Manual Communication Log**: Lets you keep a manual log of communications such as phone calls or personal meetings. The log includes a timer, which may be useful for organizations that track development time.
- **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.
- **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.

Prospecting and Proposals: **Good**

- **Prospecting Workflow**: Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. A "cultivation management" feature also allows you to track stages, priorities, and dates in a way that will robustly support a number of different prospecting workflows.
- **Ticklers**: Lets you create a reminder for yourself for a particular task and date; shows the reminder in reports.
- **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.
- **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 a segmentation report.
- **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**: Cannot track a particular foundation's interest areas based on your organization's custom categories of interest without using custom fields.

Permissions: **Good**

- **Permissions**: You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field-Level Permissions**: Cannot generally define user or group permissions on a field-by-field basis, though you can lock users and roles out of specific "sensitive" fields such as "social security number".

Mail-Merging Letters: **Excellent**

- **General Mail Merge Approach**: Lets you create and save letter templates within the system, and then mail-merge to them without the need for any other system. Mail-Merging on a Mac: Lets you mail merge letters on a Mac using the system's built in word processor.
- **Flexibility of Letter and Thank You Templates**: Lets you flexibly create letter templates with complete control over layout, formats, logos and images. The built in word processor is not quite as powerful as Microsoft Word, but it's solid.
- **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 when you confirm that a batch of letters were printed.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift-entry interface by choosing from a number of letter templates.
- **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.
- **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. This functionality is better integrated than many other tools reviewed.

Emailing: **Good**

- **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**: Cannot schedule email to send in the future.
- **Email Server**: Emails are sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted.

- **Unsubscribes**: Donors must contact the organization to unsubscribe from emails.
- **Email Reports**: Does not provide any reports to help you understand how many opens or clicks an email generated.
- **Automatic Emails**: Lets you set up an automatic email to receipt an online donation. No other automatic emails are possible.

Querying: **Excellent**

- **General Querying Approach**: Lets you create powerful queries with comparative ease by choosing criteria from a well-organized interface.
- **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 comparatively 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 saving the query and editing it again.
- **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 any field in the database for the list, or export the list.

Reporting: **Excellent**

- **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, but you cannot see the cost of the campaigns.
- **Reporting on Pledges**: Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts. They provide a particularly strong "Cultivation Report" which allows you to see the details for your major donors, grants or any other prospecting process.
- **Ad-hoc Reports**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting and grouping. You can also add logos and headers, if you know HTML scripting language logos and headers.
- **Custom Fields in Ad-hoc Reports**: Custom fields can be displayed within ad-hoc reports.
- **Saving Reports**: Lets you save reports that you create or modify.
- **List of Favorite Reports**: Cannot quickly view favorite reports without navigating a much larger set.
- **Exporting Reports**: Lets you export reports to CSV formats, among others.

Payment and Web Site Integration: **Good**

- **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. You can also do this for pledges, with a similar functionality.
- **Web Sign-up Form**: People can easily sign up for your email list via an integrated sign-up form on your Web site. However, DonorPro must set this up, and you'll need someone with technical expertise to integrate it into your Web site.
- **Online Payments**: Lets you set up an online payment form on your Web site and pull online payments automatically into your database.

- **De-duping Online Actions**: Online sign-ups or payments are logged to donors' existing payment records by matching the name.
- **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**: Donors cannot set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.
- **Distributed/ Team Fundraising**: Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns within DonorPro in order to solicit donations from their own contacts. TowerCare offers another product, DonorPro CMS, which is integrated with the DonorPro database and offers this functionality.
- **Membership Dues**: Lets members pay membership dues online.
- **Shopping Cart**: Does not support multiple purchases at the same time.
- **Payment Form Customization**: Vendor provides functionality to allow you to embed online payment forms into your own Web site, thus completely matching your Web site. However, you'll need someone with technical expertise to help set it up. Or, you can add custom fields and a logo to the payment form, but it is not otherwise customizable.
- **Transaction Fees**: Vendor does not charge a transaction fee for each payment. The vendor recommends a specific merchant account, for which the fees are 2.25 percent plus $0.25 per item, including the merchant fee.
- **Refunds**: You must issue refunds through the merchant account, and then log the refund into the system manually.

Tracking Events: **Excellent**

- **Event Registrants**: Lets you track everyone who has registered for a particular event, with an optional Events module for $500.
- **Tracking Guests**: Lets you track non-paying guests for particular events, and distinguish them from those who paid, with an optional Events module for $500.
- **Table Details**: Lets you manage table details for an event, including names of table captains, seating arrangements and the amount of gifts raised per table, with an optional Events module for $500.
- **Nametags**: Lets you create nametags for an event via the standard mail merge process.
- **On-Site Registration**: Provides a "Day of Event" registration screen optimized for quick entry of walk-up registrants.

Tracking Other Built-In Interactions: **Excellent**

- **Volunteer Interests**: Lets you track a detailed profile of someone's interests and aptitudes, including several different types of information, in order to match volunteers to jobs. This functionality requires an optional module at additional cost.
- **Volunteer Work Tracking**: Lets you log volunteer activity for supporters, including date, duration and tasks, as well as the dollar equivalent for their time.
- **Membership Tracking**: Does not provide any specific functionality to track member levels, payments and expiration dates, except through custom fields.
- **Other Interactions**: In addition to the interactions we've covered here, the system offers support for recruitment, inventory management and a patient services module to securely track information such as diagnoses, medications, and contacts.

Customization: **Good**

- **Customizing Values**: Lets you customize all system drop-down values, for fields such as campaigns, type of relationships and many others.
- **Custom Fields**: Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields**: Cannot rename existing fields.
- **Moving or Deleting Fields**: Cannot move or delete existing fields.
- **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), using their Forms functionality.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn't often do so.

- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration: **Good**

- **Existing Integrations**: Can automatically exchange data with X-Charge payment processor, Wealth Engine, Outlook, Lotus Notes and any other contact management system that supports automatic integration for the .ICS format.
- **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.
- **Programmatic Integration**: Provides some ability for a programmer to access data via HTML, but this is not a robust functionality.

Accounting Support: **Excellent**

- **Existing Integrations**: Lets you create file formats tailored to upload easily into QuickBooks, MiP, Quicken, MAS 90, Jenzabar and Peachtree.
- **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**: Lets you mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations**: A payment can be edited after reconciliation by those with appropriate permissions, by un-posting the batch.

Ease of Use: **Excellent**

- **Ease of Use for Novices**: Moderate. The layout is well-organized and generally fairly understandable. However, it's a complex system, and it will take some time to learn.
- **Speed for Expert Users**: Easy. Once you have mastered the system, it becomes quite quick to use. Terminology is easy to understand, and the system provides a fair amount of functionality to optimize time consuming tasks, like data entry.

Support and Training: **Excellent**

- **Training**: Vendor provides training, either live or via the Internet, at additional cost.
- **Manuals and Documentation**: Provides context sensitive text throughout the application, as well as a written manual. Recorded Webinars are also available without charge.
- **Support**: Vendor provides unlimited phone or email support without additional cost.

Installation and Maintenance: **Excellent**

- **Installation and Maintenance**: 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, connectivity to the Internet and updates.

Product Background: **Good**

- **History**: Vendor has been in business for more than six years; DonorPro package has also been in use by clients for more than six years.
- **Clients**: Vendor reports 250-plus clients for this particular package.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
- **Roadmap**: The vendor provides two new releases each year. Planned functionality includes the ability to integrate the look and feel of online payment pages with no technical expertise needed on the customer side. Other enhancements include online ticketing, online volunteer time tracking, additional search capabilities including constituent searches on custom fields, enhanced householding functionality and enhanced planned giving support.

eTAPESTRY
BY BLACKBAUD

www.etapestry.com

eTapestry provides useful and affordable functionality for small organizations who aren't yet tracking a lot of donors, with a growth path to a more feature-rich system (although at considerable additional cost). The base product provides strong gift- and donor-tracking functionality, and querying, as well as reasonable email and reporting functionality. You can mail-merge letters (even on a Mac), but you'll need to export data from the system in order to create labels or envelopes. The system is very configurable—in addition to adding custom fields or deleting existing fields, you can add configurable "Journal" entries which allow you to track multiple linked fields (for instance, a date, a category and a rating for the same interaction). Many system functionalities require an additional charge, however—for instance, importing data, advance emailing, online payments and Web integration all require additional fees. There are a lot of features and options in the system, and some terminology may not be intuitive to all users, making it more complex to use than many we reviewed. The price varies greatly depending on the number of people using the system, the features you add, and the number of donors you store. The base system is free for a single user and up to 500 users, or $444 per year for one user and up to 1,000 donors. It quickly increases in price from there. For instance, 25,000 donors and three users who could use the system at the same time would cost about $4,000 per year. Support is extra, starting at $330 per year.

The Basics

- **Technical Setup**: Online service hosted by eTapestry.
- **Pricing**: The price varies greatly depending on the number of people using the system and the number of donors you store. It's free for a single user and up to 500 donors, or $444 per year for one user and up to 1,000 donors. It quickly increases in price from there. For instance, 25,000 donors and three users who could use the system at the same time would cost about $4,000 per year. (Unlike most systems, you can have as many user accounts as you like; the pricing is for the number of people who can use the system at the same time). Support is extra, starting at $330 per year. A number of the features included in this review require additional modules at additional cost.

Adding and Tracking Donations: **Good to Excellent**

- **Quick Search**: Lets you quickly search the database for an existing person from anywhere in the interface using a single keyword field, or a form that searches basic contact information, including email.
- **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 that match an algorithm based on name and address fields. This is optional; you can turn off the duplicate checking.
- **Adding a Gift**: Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts**: The system does not group donations into batches for reconciliation with accounting systems.
- **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 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, but this requires an add-on module at additional cost.
- **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. In addition, everyone is notified with a little paperclip icon next to the donor name and red pledge text when a pledge exists.
- **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 two-step process. You first define the matching relationship, including the match gift ratio. When you then add the donation, the match amount will be automatically created as a pledge for the matching organization. This is a bit awkward to set up a first match, but is stored for future gifts from this donor.
- **Other Gift Types**: Supports tracking of tribute gifts, bequeathments, and in-kind and stock gifts. The system is quite configurable to support additional gift types.
- **Campaigns or Funds**: Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these. Robust functionality in this area allows you to "segment" a gift – to split it into multiple linked records, with each gift having a separate source, campaign, or fund.
- **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. However, assigning credit to multiple people requires more steps than in some other systems.
- **Gift Notes**: Lets you add freeform notes to a gift.
- **Organizational Gifts**: Lets you associate gifts with an organization as opposed to individuals.

Managing Donor Information: **Excellent**

- **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 very prominent message in a colored Post It 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 two-way ("spouse") or directional ("boss; works for..."), but not one way, and automatically assigns the proper relationships for each.
- **Viewing Relationships**: Lets you easily view everyone with whom a donor has relationships.
- **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 split a household and manage decisions about where to attribute gifts.
- **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 freeform notes about donors, but it's difficult to enter and view a large quantity of notes.
- **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.
- **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. You can configure this screen to choose the lists and aggregate stats that are most useful to you.
- **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.

Prospecting and Proposals: **Good**

- **Prospecting Workflow**: Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You can also configure "journal entries" to track a date for when a donor reached a particular stage, but it would be difficult to view all these entries together in a particular order as an integrated look at a process.
- **Ticklers**: Lets you create a reminder for yourself for a particular task and date; shows the reminder at the appropriate time.
- **Creating Ticklers for Others**: Lets you create a reminder for someone else to do a task on a particular date. You have a number of options here—you can assign a task to your organization as a whole, to one or more people, or to a "query" of people based on how they are related to other info in the system.
- **Donor Research**: Automatically matches donor information to outside resources in order to provide more information on giving capability and priority—at additional cost. Vendor provides a number of strong options in this area, but none are included in the base package.
- **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 running a query.
- **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.

Permissions: **Excellent**

- **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 and by query, allowing extremely detailed and granular access to specific data based on a saved query.

Mail-Merging Letters: **Fair**

- **General Mail Merge Approach**: Lets you create and save letter templates within the system, and then mail-merge to them without the need for any other system.
- **Mail-Merging on a Mac**: Lets you mail merge letters on a Mac using the system's built in word processor.
- **Flexibility of Letter and Thank You Templates**: Lets you flexibly create letter templates with complete control over layout, formats, logos and images using the built-in word processor
- **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 when you confirm that a batch of letters were printed.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift-entry interface by choosing from a number of letter templates.
- **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**: Cannot create letters that include custom gift strings based on a donor's previous giving history.
- **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**: After you print out letters, you must navigate to a different interface to print out labels for that mailing. The built in word processor does not support envelopes or labels, so you'll need to export your data and merge it by hand, for instance with Excel and Word.

Emailing: **Good to Excellent**

- **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**: Cannot 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, with an advanced module at additional cost
- **Email Server**: Emails are sent through the vendor's email server, protecting you from blacklisting issues. The basic system does not provide help to ensure email goes to donors' inboxes rather than their Spam filters. The "Delivera" module, at considerable additional cost, provides a number of advanced features in this area.
- **Unsubscribes**: Donors must contact the organization to unsubscribe from emails in core program, advanced module does this for a fee.
- **Email Reports**: The base system does not provide any reports to help you understand how many opens or clicks an email generated in core program. An advanced module provides these reports at additional cost.
- **Automatic Emails**: Lets you set up automatic emails based on certain events, like a Web form submission, with an advanced module at additional cost.

Querying: **Excellent**

- **General Querying Approach**: Lets you create powerful queries with comparative ease. Many queries can be done on one screen, and you choose from all the fields, or set limits up front to reduce the clutter and choices.
- **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".
- **Expanding Queries**: Lets you easily limit or expand a query after you've generated the list by saving the query and editing it again.
- **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 any field in the database for the list, or export the list.

Reporting: **Good**

- **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 in one report, including the donations compared to the 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**: Cannot create ad hoc reports in the system that allow you to chose what columns you want to include and add groups or totals. Nearly any field displayed to users can be queried and then exported for further formatting in Excel.

- **Custom Fields in Ad-hoc Reports**: Custom fields can be exported to use to create ad-hoc reports outside the system.
- **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 formats, among others.

Payment and Web Site Integration: **Fair to Excellent**

- **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 Web site, at substantial additional cost. This requires the eCommerce modules, and in some cases you must pay eTapestry to build the Web forms.
- **Online Payments**: Lets you set up an online payment form on your Web site and pull online payments automatically into your database, at additional cost, using the eCommerce module.
- **De-duping Online Actions**: Online sign-ups or payments are logged to donors' existing payment records, by matching the name and email address.
- **Event Registration**: Lets you accept online registration fees for events, at additional cost, using the eCommerce module. You'll also need to customize the Journal fields to track this information, which is a significant setup task.
- **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. This requires the optional ecommerce module.
- **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, at additional cost. This requires two additional modules.
- **Membership Dues**: Lets members pay membership dues online, at additional cost, using the eCommerce module.
- **Shopping Cart**: Lets supporters purchase multiple items at once, as through a shopping cart, with an optional Shopping Cart module at additional charge.
- **Payment Form Customization**: Vendor provides an online payment form which can be somewhat customized to match your Web site's colors and fonts, but not your Web site navigation.
- **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**: You must issue refunds through the merchant account, and then log the refund into the system manually.

Tracking Events: **Fair**

- **Event Registrants**: Lets you track everyone who has registered for a particular event. However, this is done through custom fields in the Journal rather than event specific functionality, and is not robust.
- **Tracking Guests**: Cannot distinguish non-paying guests for an event from those that paid, unless you configure this using custom fields in the Journal. While the Journal could support some functionality here, it would not be as robust as the Tracking Events provided by some other systems.
- **Table Details**: Cannot manage any table details for an event, such as names of table captains, seating arrangements or the amount of gifts raised per table unless you configure this using custom fields in the Journal.
- **Nametags**: Lets you 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.

Tracking Other Built-In Interactions: **Fair**

- **Volunteer Interests**: Cannot track any information about interests to help match volunteers with jobs unless you configure this using journal records. While the Journal could support some functionality here, it would not be as robust as the Tracking Events provided by some other systems.
- **Volunteer Work Tracking**: Cannot log any details about specific hours and tasks for volunteers unless you configure

this using journal records. While the Journal could support some functionality here, it would not be as robust as the Tracking Events provided by some other systems.

- **Membership Tracking**: Does not provide any specific functionality to track member levels, payments and expiration dates, except through custom fields.
- **Other Built-In Interactions**: In addition to the interactions we've covered here, the system offers support for telethons, donor wish lists and donor loyalty surveys. Donors can also log in to update their own information.

Customization: **Excellent**

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.
- **Custom Fields**: Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields**: Lets you rename existing fields at no additional cost
- **Moving or Deleting Fields**: Lets you move many fields within the interface, or delete them altogether.
- **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), using their Journal functionality.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration: **Fair to Excellent**

- **Existing Integrations**: Can automatically exchange data with a wide variety of third party tools. However, all these integrations require additional cost.
- **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. This requires an additional module at additional cost.
- **Programmatic Integration**: Provides an API to allow a programmer to create custom data feeds to an external system. This API does not require an additional cost.

Accounting Support: **Fair**

- **Existing Integrations**: Lets you create a file format tailored to upload easily into QuickBooks, MiP, Fund Accounting and about 10 other common systems.
- **Approach to Batching**: Does not help you to create batches of payments per se, to ease the reconciliation process with an accounting system. You can create a query and run an export, but these gifts are not marked as part of a specific batch.
- **Reconciling a Batch**: Cannot mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations**: By default, there are no controls in place to prevent someone from editing a payment that has already been reconciled, thus throwing the system out of balance with the accounting system. However, you can mark a transaction as "final", either gift by gift or by updating through a query, which prevents it from being edited by anyone other then the system supervisor. The last user editing the gift is tracked, and you could restrict the group of people who can edit reconciled donations, or prohibit it altogether, using the (complex) advanced permissions functionality.

Ease of Use: **Fair**

- **Ease of Use for Novices**: Complex. There are a lot of features and options in the system, and multiple ways to get work done. Some terminology used may not be intuitive to all users—some terms can be changed, but some cannot. Most users will require training that helps them to map their workflow to the system.
- **Speed for Expert Users**: Moderate. The system is not optimally laid out to speed repetitive tasks, although it

provides special functionality for some, such as gift data entry. Users may occasionally experience pages that are slow to load, which can also slow down work in the system.

Support and Training: **Good**

- **Training**: Vendor provides training in person and via the Internet at additional cost.
- **Manuals and Documentation**: Provides an online help section with written documentation. Online videos are available at additional cost.
- **Support**: Vendor provides unlimited email and phone support for an additional fee. There are a number of levels and price points available.

Installation and Maintenance: **Excellent**

- **Installation and Maintenance**: 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, connectivity to the Internet, and updates.

Product Background: **Excellent**

- **History**: The eTapestry package has been in use by clients for about 10 years. The product was recently purchased by Blackbaud, which has been in business since 1981.
- **Clients**: Vendor reports about 5,000-plus clients for this particular package.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
- **Roadmap**: The vendor reports that their short term focus will be on the continuous enhancement process for the existing application and modules (with special focus on advanced email) as well as improving the ease of use with the application.

GIFTWORKS
BY MISSION RESEARCH

www.missionresearch.com

Giftworks is a very friendly, polished system that offers impressive functionality for its low price. It provides useful gift tracking and donor management functionality, with a nice "dashboard" of all your interactions with a donor. Emailing, mail-merging, querying, reporting and accounting controls are also solid. While the base product is limited in its support for interactions beyond off-line donations, add-on modules provide functionality for events, volunteer tracking and online donations. The Premium version adds support for seasonal addresses, different user roles and additional custom fields. The system is full of wizards and features to make it easy for you to find what you need, but it doesn't support the advanced user as much as some other systems with, for instance, an interface to support bulk gift entry, or advanced ad-hoc reporting tools. Giftworks Standard is $399 per license; the Premium edition is $699 per license. Additional Volunteer, Events and Online Donation modules are from $149 to $299 each per license (there's an additional monthly fee for the Online Donations module). Email support is free, but phone support costs $399 per year for your whole organization.

The Basics

- **Technical Setup**: Installed onto PC desktop computers.
- **Pricing**: Giftworks Standard is $399 per license; the Premium edition is $699 per license. The Volunteer module is $199 per license; the Events module is $299 per license; and the Online Donations module is $149 with a monthly fee of $29.99. Email support is free, but phone support costs $399 per year for your whole organization.

Adding and Tracking Donations: **Good**

- **Quick Search**: Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches first and last name.
- **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.
- **Adding a Gift**: Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. This is a very easy, intuitive process.
- **Batching Gifts**: For ease of reconciling with accounting systems, gifts are associated with a batch after entry. To define the batch, you query to find a group of gifts, save it as a "transaction" and post it in order to output it to QuickBooks or a CVS format for a date range.
- **Gift Quick-Entry Interface**: Does not provide a streamlined quick data-entry interface within the system, although gift data can be imported.
- **Updating Donor Info via Quick Entry**: There is no quick data-entry interface.
- **Importing Gifts**: Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.
- **Adding a Pledge**: Lets you enter pledges for future gifts, including the amount and scheduled date. Each pledge must be entered by hand, as opposed to being generated based on a payment schedule.
- **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 one of seven reports to see pledges that are near due or overdue, but staff members are not proactively notified.
- **Matching Gifts**: Lets you track matching gifts that need to be claimed from an employer through a special type of relationship called a "matching gift relationship." The pledge itself needs to be added to the matching donor by hand, but the relationship allows you to see the association and to create queries based on it.
- **Other Gift Types**: Supports tracking of tribute gifts, bequeathments, in-kind gifts (including a description of the gift and value), stock gifts and restricted donations.
- **Campaigns or Funds**: Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these.
- **Tracking Credit for the Gift**: Lets you assign credit in the database for bringing in a gift to as many non-staff members as you like (using the relationship functionality), but only to a single staff member.
- **Gift Notes**: Lets you add freeform notes to a gift, as well as a "task" with a date, topic and campaign information associated with it.
- **Organizational Gifts**: Lets you associate gifts with an organization as opposed to individuals.

Managing Donor Information: **Good to Excellent**

- **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**: Standard version lets you track people's seasonal addresses with effective dates. The Premium version automatically switches primary addresses for the appropriate timeframe.
- **Do Not Contact**: Lets you mark that a particular person should not be contacted (by mail, email or phone), but staff must check a particular field to see it.
- **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 relationships.
- **Householding**: A database record can describe an entire household—individuals can be listed on that record with a minimal amount of name and contact info. Alternatively, individuals can be listed as separate records with all their contact information and actions; you can connect them to others in their household through special 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**: A large text area lets you enter and view freeform 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.
- **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.

Prospecting and Proposals: **Fair**

- **Prospecting Workflow**: Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You could also configure "Tasks" to track a date for when a donor reached a particular stage, but it would be difficult to view all these entries together in a particular order as an integrated look at a process.

- **Ticklers**: Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently in the Notes & Tasks screen. You can assign it to yourself, view your calendar to see all reminders, print it or see a list of reminders by day.
- **Creating Ticklers for Others**: Cannot create a reminder to be viewed by someone else (although you could create one for yourself to remind them).
- **Donor Research**: Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority.
- **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 running a query.
- **Proposal Tracking**: Cannot easily track what proposals are due, what you've submitted and what has already been approved by a particular foundation.
- **Foundation Interest Tracking**: Cannot track a particular foundation's interest areas based on your organization's custom categories of interest.

Permissions: **None to Good**

- **Permissions**: Standard package has only a single level of permissions for the whole system. Giftworks Premium lets you grant individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field-Level Permissions**: Cannot define user or group permissions on a field-by-field basis.

Mail-Merging Letters: **Good**

- **General Mail Merge Approach**: Lets you create and save letter templates within the system, and then mail merge to them without the need for any other system.
- **Mail-Merging on a Mac**: Cannot mail merge letters on a Mac, as this is a PC-based system.
- **Flexibility of Letter and Thank You Templates**: Lets you create template with some control over format, logos and images, but your ability to create unusual layouts is limited.
- **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 when you confirm that a batch of letters were printed.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift-entry interface by choosing from a number of letter templates.
- **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.
- **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 (standard Avery or full custom) for a set of people from the same query result page used to print letters.

Emailing: **Good**

- **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**: Cannot easily send emails that include custom, calculated gift strings based on a donor's previous giving history. This could be done, but it would involve some complicated manipulation of a custom field.
- **Graphical Emails**: Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails**: Cannot schedule email to send in the future.
- **Email Server**: Emails are sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted.
- **Unsubscribes**: Donors must contact the organization to unsubscribe from emails.
- **Email Reports**: Does not provide any reports to help you understand how many opens or clicks an email generated.
- **Automatic Emails**: Cannot set up automatic emails based on certain events, like a Web form submission.

Querying: **Excellent**

- **General Querying Approach**: Lets you create powerful queries with comparative ease by choosing criteria from a well-organized interface.
- **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".
- **Expanding Queries**: Lets you easily limit or expand a query after you've generated the list by saving the query and editing it again.
- **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 any field in the database for the list or export the list.

Reporting: **Excellent**

- **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 in one report, including the donations compared to the 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 very basic ad-hoc reports by choosing what columns you want to include, and adding groups or totals. You cannot add a logo, header or other look/feel enhancements.
- **Custom Fields in Ad-hoc Reports**: Custom fields can be exported to use to create ad-hoc reports outside the system.
- **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, through a very friendly and intuitive "smart lists" feature.
- **Exporting Reports**: Lets you export reports to Excel, .CSV or QuickBooks formats.

Payment and Web Site Integration: **None to Good**

- **Processing Credit Cards**: Lets you charge donors' credit cards within the system by entering them into an online form, with the Online Donation module at additional cost.
- **Recurring Gifts**: Lets you set up recurring gifts which are charged to donors' credit cards at designated intervals. These gifts are

not automatically logged in the system, however—in order to be tracked, a system administrator must manually upload them.

- **Web Sign-up Form**: People can easily sign up for your email list via an integrated sign-up form on your Web site. This requires the Online Donations module, at additional cost.
- **Online Payments**: Lets you set up an online payment form on your Web site and pull online payments automatically into your database, at extra cost, with the Online Donations module. This is implemented through a partnership with Qgiv, an online payment vendor. Signups or online payments are not automatically logged to their existing payment record—you must proof the list and confirm accuracy of payments, then submit to log them.
- **De-duping Online Actions**: The interface that you use to proof the list of online payments matches donors by first, last and middle name, and organization, and shows you potential duplicates.
- **Event Registration**: Cannot accept online registration fees for events.
- **Online Recurring Payments**: Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.
- **Distributed/ Team Fundraising**: Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.
- **Membership Dues**: Members cannot pay membership dues online.
- **Shopping Cart**: Does not support multiple purchases at the same time.
- **Payment Form Customization**: Vendor provides functionality to allow you to embed an online payment form into your own Web site.
- **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**: You must issue refunds through the merchant account, and then log the refund into the system manually.

Tracking Events: **Fair to Excellent**

- **Event Registrants**: Lets you track everyone who has registered for a particular event using the Event module, at $299 per license. In addition, this module lets you track invitations, who actually attended and sponsors.
- **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 the system's label generator.
- **On-Site Registration**: Does not provide any specific functionality to support on-site registration.

Tracking Other Built-In Interactions: **Fair to Good**

- **Volunteer Interests**: Lets you track a detailed profile of someone's interests and aptitudes, including several different types of information, in order to match volunteers to jobs. This functionality costs an additional $199.
- **Volunteer Work Tracking**: Lets you log volunteer activity for supporters, including date, duration and tasks, but no dollar equivalent for their time. This functionality costs an additional $199.
- **Membership Tracking**: Provides functionality to track member levels, payments and expiration dates.
- **Other Built-In Interactions**: Does not provide built-in support for any constituent interactions other than what has been covered in this report.

Customization: **Fair to Good**

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships and many others. You can change list values for most fields, including the order of the list.
- **Custom Fields**: Lets you add up to 24 custom fields with the Standard package, or up to 110 with the Premium package—half on the donor screen, half on the gift-entry screen.
- **Renaming Fields**: Cannot rename existing fields.
- **Moving or Deleting Fields**: Cannot move or delete existing fields.

- **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), using Notes and Tasks functionality.
- **Vendor Customization**: Vendor does not customize the system.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration: **Fair**

- **Existing Integrations**: Can automatically exchange data with Microsoft Outlook, as well as the United States Postal Service Change of Address Service.
- **Data Export**: Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import**: Lets you import files of donor and gift information to the proper fields in the system, but the information must be in a specified file layout.
- **Programmatic Integration**: Does not allow a programmer to create custom data feeds to an external system.

Accounting Support: **Good**

- **Existing Integrations**: Lets you automatically export data to QuickBooks.
- **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."
- **Controlling Reconciled Donations**: There are no controls in place to prevent someone from editing a payment that has already been reconciled. However, the edit would create a void and new transaction on the transaction register, to be synched to your accounting system.

Ease of Use: **Excellent**

- **Ease of Use for Novices**: Easy. The system is carefully designed to be free of clutter, and easy to understand. There are easy step-by-step wizards, searches and quick lists for many features.
- **Speed for Expert Users**: Moderate. The system is optimized around the needs of novice users, and while all are likely to find it intuitive, experienced development directors may wish for more flexibility and shortcuts to ease repetitive tasks.

Support and Training: **Good**

- **Training**: Vendor provides online training at additional cost. "Gift Works University" offers one- to two-hour courses for $79 per course.
- **Manuals and Documentation**: Provides an online help section, documentation and manuals.
- **Support**: Vendor provides unlimited email support without additional cost. Phone support is also available, but it costs extra.

Installation and Maintenance: **Good**

- **Installation and Maintenance**: 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.

Product Background: **Excellent**

- **History**: MissionResearch has been in business for eight years; Giftworks has been in use by clients since 2001.
- **Clients**: Vendor reports about 8,000 clients for this particular package.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
- **Roadmap**: The vendor is currently working on a hosted version of Giftworks, planned for release by the end of 2009.

MISSION ASSIST
BY DONOR STRATEGIES

www.donorstrategies.com

Mission Assist has integrated, useful support not just for adding gifts and tracking donor information, but also for events, volunteers, membership and online payment functionality. You can also send emails through the system, including merging some basic fields. However, it doesn't support any custom fields or custom interactions, and you'll need to export data out of the system and merge it by hand to create mail-merged letters other than thank you letters. The layout is crowded at times, and some screens are not optimally laid-out. The system is $1,495 for a single user, or $2,495 for unlimited users. Web site integration and online payments cost an additional $600 per year. Support is extra, at $250 for a single user or $500 for unlimited users.

The Basics

- **Technical Setup**: Installed onto PC desktop computers.
- **Pricing**: The system is $1,495 for a single user, or $2,495 for unlimited users. Web site integration and online payments is an additional $600 per year. Support is extra, at $250 for a single user or $500 for unlimited users.

Adding and Tracking Donations: **Good**

- **Quick Search**: Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches name and basic address fields.
- **Quick Search on Custom Fields**: There are no custom fields available, so there is no way to find a person by searching on custom criteria.
- **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.
- **Adding a Gift**: Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts**: The system does not group donations into batches for reconciliation with accounting systems.
- **Gift Quick-Entry Interface**: Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface; however, this interface can not be tailored on the fly with the appropriate fields and defaults for a particular set of gifts.
- **Updating Donor Info via Quick Entry**: The quick-entry interface only supports data entry for gifts, and doesn't let you automatically create new donors or update donor contact information.
- **Importing Gifts**: Lets you easily map and import donor and gift information in custom file formats. However, data can only be imported to a limited set of fields—30 contact and basic donor fields are available.
- **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**: System users can opt to be notified when a pledge is near due, or run a report to see pledges that are near due. Pledges can be assigned to specific people on a pledge payment by payment basis.
- **Matching Gifts**: Lets you track matching gifts that need to be claimed from an employer through entering a gift, selecting the matching entity, and then the match ratio (for instance, a 2:1 match). It does not track the match ratio for the matching organization, so this must be remembered per gift entry.

- **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. You can split the gift across up to five "Gift Use/ Purpose" values, and could use this field to track what you want, but you could only split it across a single field.
- **Tracking Credit for Gifts**: Lets you assign credit in the database for bringing in a gift to only to one person and one matching gift company.
- **Gift Notes**: Lets you add freeform notes to a gift.
- **Organizational gifts**: Lets you associate gifts with an organization as opposed to individuals.

Managing Donor Information: **Good**

- **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 mark that a particular person should not be contacted, but staff must check a particular field to see it.
- **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 relationships.
- **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 relationships.
- **Staff Relationships**: Lets you track which of your own staff members is responsible for the relationship with a donor, but not other connections with staff members.
- **Donor Notes**: Lets you enter and view freeform notes about donors. The default text area is not large, but you can double-click on it to make it easier to enter or view a large quantity of notes.
- **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 that there has been recent activity or communications with a donor, but this information is not grouped together in one screen. However, there is a long report that provides this information.
- **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.

Prospecting and Proposals: **Good**

- **Prospecting Workflow**: Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. It has additional built in features to manage major donor and grants processes. There's little ability to define and track a custom workflow beyond these features, however.
- **Ticklers**: Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on startup of the application.
- **Creating Ticklers for Others**: Lets you create a reminder for someone else to do a task on a particular date.
- **Donor Research**: Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority.
- **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 see the list of donors assigned to you as a solicitor by running a report. This is harder to generate than with most other systems, as it involves a number of steps and potentially setting up 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.

Permissions: **Fair**

- **Permissions**: You can grant individuals access to six preset user roles which define what system information they have access to. You cannot control permissions at a more detailed level than that.
- **Field-Level Permissions**: Cannot define user or group permissions on a field-by-field basis.

Mail-Merging Letters: **Good**

- **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 Word templates by opening the Word template through the system and choosing to merge. This is not quite as integrated as a typical mail merge to Word, but does not require you to export data.
- **Mail-Merging on a Mac**: Cannot mail merge letters on a Mac, as this is a PC-based system.
- **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 when you confirm that a batch of letters were printed, or you can opt not to.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift-entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous**: Lets you query to find all those who need to be thanked (for example, by finding recent donors who have not yet been thanked), but you cannot specifically create a queue of thank you letters. Once you query, you can create letters for them all 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: **Good**

- **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**: Cannot 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**: Cannot schedule email to send in the future.

- **Email Server**: Emails are sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted.
- **Unsubscribes**: Donors must contact the organization to unsubscribe from emails.
- **Email Reports**: Does not provide any reports to help you understand how many opens or clicks an email generated.
- **Automatic Emails**: Cannot set up automatic emails based on certain events, like a Web form submission.

Querying: **Good**

- **General Querying Approach**: Lets you create powerful queries, but the interface to do this is less intuitive than some other tools. The interface presents a number of categories, fields and options that are not completely intuitive in combination. The querying interface will require training to understand.
- **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 fields. As the system does not allow custom fields, custom criteria cannot be used for querying.
- **Complex Queries**: Lets you create complicated queries using an unlimited number of criteria connected with logical "ands" and "ors".
- **Expanding Queries**: Lets you easily limit or expand a query after you've generated the list by saving the query and editing it again.
- **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 any field in the database for the list or export the list.

Reporting: **Good**

- **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). Currently more than 100 canned reports, more in constant development.
- **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, but you cannot see the 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**: Cannot create ad hoc reports in the system that allow you to choose what columns you want to include and add groups or totals. Nearly any field displayed to users can be queried and then exported for further formatting in Excel.
- **Custom Fields in Ad-hoc Reports**: The system does not allow custom fields.
- **Saving Reports**: Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports**: Cannot quickly view favorite reports without navigating a much larger set.
- **Exporting Reports**: Lets you export reports to Word, Excel or CSV formats, among others.

Payment and Web Site Integration: **Good**

- **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. You need to manually kickoff the process to run the credit cards for the batch.
- **Web Sign-up Form**: Does not provide a way for people to sign up for your email list from your Web site.
- **Online Payments**: Lets you set up an online payment form on your Web site and pull online payments automatically into your database.

- **De-duping Online Actions**: Online sign-ups or payments are logged to donors' existing payment records, matching first name and last name. Matches are automatically approved, while non-matches appear in a report for you to deal with manually.
- **Event Registration**: Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) but not meal options. Each online payment form will require an additional fee.
- **Online Recurring Payments**: Donors cannot set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.
- **Distributed/ Team Fundraising**: Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.
- **Membership Dues**: Lets members pay membership dues online. Each online payment form will require an additional fee.
- **Shopping Cart**: Does not support multiple purchases at the same time.
- **Payment Form Customization**: Vendor provides an online payment form which can be somewhat customized to include your Web site logo, but not your Web site font, colors or navigation.
- **Transaction Fees**: Vendor does not charge a transaction fee for each payment. You will need to set up your own merchant account using PayPal, which will entail additional transaction fees.
- **Refunds**: You must issue refunds through PayPal, and then log the refund into the system manually.

Tracking Events: **Excellent**

- **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 names of table captains, seating arrangements, and the amount of gifts raised per table.
- **Nametags**: Lets you easily create nametags for an event through the label generator or a merge with Word.
- **On-Site Registration**: Does not provide any specific functionality to support on-site registration.

Tracking Other Built-In Interactions: **Good**

- **Volunteer Interests**: Lets you track one set of interests in order to match volunteers with jobs.
- **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 Built-In Interactions**: Does not provide built-in support for any constituent interactions other than what has been covered in this report.

Customization: **None/ Not Applicable**

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.
- **Custom Fields**: Cannot add any custom fields.
- **Renaming Fields**: Cannot rename existing fields.
- **Moving or Deleting Fields**: Cannot move or delete existing fields.
- **Custom Constituent Interactions**: Cannot create 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 customize system to your needs at additional cost, but doesn't often do so.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration: **Fair**

- **Existing Integrations**: Does not automatically exchange data with any third-party systems beyond QuickBooks at this time.

- **Data Export**: Lets you export all data visible to users into another file format, such as .XLS, .CSV, or other comma-separated text formats.
- **Data Import**: Lets you map different files of donor and gift information to the proper fields in the system, and import the data. However, you can only import to a set of 30 specific donor and gift fields.
- **Programmatic Integration**: Does not allow a programmer to create custom data feeds to an external system.

Accounting Support: **Fair**

- **Existing Integrations**: Lets you automatically export data to QuickBooks 2002 and above. Cannot make a format tailored to any other system, just a generic .csv file.
- **Approach to Batching**: Does not let you create batches of payments in order to ease the reconciliation process with an accounting system. You can link each gift to a ledger code, which is used to place the gift correctly in QuickBooks, but gifts are not marked as part of a specific batch.
- **Reconciling a Batch**: Cannot mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations**: There are no controls in place to prevent someone from editing a payment that has already been reconciled, thus throwing the system out of balance with the accounting system.

Ease of Use: **Good**

- **Ease of Use for Novices**: Moderate. Some of the screens are quite busy, and rely on technical terms that won't be intuitive to all users. Segmentation features are quite complex. It will require some time to learn, and most users will require training on segmentation.
- **Speed for Expert Users**: Moderate. Those with experience with the system will find it easier to use, but may wish for additional functionality to support custom workflows, or better ease repetitive tasks.

Support and Training: **Excellent**

- **Training**: Vendor provides unlimited training online or by phone at no additional cost.
- **Manuals and Documentation**: Provides an online help section, and a manual in PDF format.
- **Support**: Vendor provides unlimited email and phone support for a yearly fee, which is mandatory upon the purchase of the system.

Installation and Maintenance: **Good**

- **Installation and Maintenance**: 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. If you prefer, the vendor can install the system and updates for you via a remote connection.

Product Background: **Good**

- **History**: Vendor has been in business since 1995; Mission Assist has been in use by clients since 1995.
- **Clients**: Vendor reports about 270-plus clients for this particular package.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.

NEON
BY Z2 SYSTEMS

www.z2systems.com

Neon is a strong, integrated online system with reasonable support for donor management. It has limited support for pledges, soft credits and batches for accounting purposes, and you cannot import gift data, but it does support matching gifts and gifts from organizations, and has reasonable relationship and household tracking. The support for mail-merged letters is useful, and it's the strongest system we reviewed for emailing, Web integration and online payment processing, reporting, querying and the ability to customize. It supports a wide variety of constituent interactions—it not only has events, volunteers and membership functionality, but also full online-store functionality, including inventory tracking. The price varies depending on the number of donors you store. For instance, it's $360 per year for up to 1,000 donors, $1,800 per year for up to 10,000 donors, and $3,588 per year for up to 50,000 donors. Support is extra: email support costs $180 per year.

The Basics

- **Technical Setup**: Online service hosted by Z2 Neon
- **Pricing**: The price varies depending on the number of donors you store. For instance, it's $360 per year for up to 1,000 donors, $1,800 per year for up to 10,000 donors and $3,588 per year for up to 50,000 donors. These prices support up to five users at the same time; additional users are $180 per year each. Support is extra; email support costs $180 per year, while email and phone support costs $1,188 per year. Sending more than two broadcast emails per month to each donor will also incur additional fees.

Adding and Tracking Donations: **Fair**

- **Quick Search**: Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches any standard or custom field.
- **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 email.
- **Adding a Gift**: Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. You can easily add a donation through the "Donation" tab; however, the "Add a Donation" button is low on the Donor Detail page, so you must scroll to see it.
- **Batching Gifts**: The system does not group donations into batches for reconciliation with accounting systems.
- **Gift Quick-Entry Interface**: Does not provide a streamlined quick data entry interface within the system. Gifts cannot be imported except by vendor during installation.
- **Updating Donor Info via Quick Entry**: There is no quick data-entry interface.
- **Importing Gifts**: Users cannot import gift data. Only Z2 can import gift data.
- **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, with some limited ability to customize as needed.
- **Viewing Pledges on Gift Entry**: When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so.
- **Reminders for Pledges**: Staff members are notified when they log in that a pledge is near due.
- **Matching Gifts**: Lets you track matching gifts that need to be claimed from an employer by adding the donation, defining it as a matched gift and then filling out a summary screen that allows you to "add matched pledge".

- **Other Gift Types**: Supports tracking of tribute gifts, bequeathments, and in-kind and stock gifts.
- **Campaigns or Funds**: Lets you assign gifts to a source, purpose, campaign, sub-campaign and fund, but you cannot split the gift across multiple of any of these.
- **Tracking Credit for Gifts**: Cannot assign credit in the database for bringing in a gift.
- **Gift Notes**: Lets you add freeform notes to a gift.
- **Organizational gifts**: Lets you associate gifts with an organization as opposed to individuals.

Managing Donor Information: **Excellent**

- **Multiple Contact Methods**: Lets you track three phone numbers, three email addresses and unlimited physical addresses. You can label each of them (for example, "office" and "cell phone"), mark the primary number and address, and track each donor's 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 very prominent message in red text at the top of the donor record 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 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 relationships.
- **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.
- **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**: A large text area lets you enter and view freeform notes about donors. The system also provides the ability upload documents for any donor.
- **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—although, a particularly long screen.
- **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.

Prospecting and Proposals: **Fair**

- **Prospecting Workflow**: Lets you assign either a priority or a stage to a donor in order to manage a prospecting workflow, but you cannot track both at the same time. There's little ability to define and track a custom workflow, however.
- **Ticklers**: Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on the left of every screen at the appropriate time, and can optionally email you a reminder.
- **Creating Ticklers for Others**: Lets you create a reminder for someone else to do a task on a particular date.
- **Donor Research**: Provides functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority via the Melissa wealth rating system. They add a star rating system to the top of the donor record measuring average household income and housing value by Zip code.
- **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 through segmentation.

- **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**: Cannot track a particular foundation's interest areas based on your organization's custom categories of interest without using custom fields.

Permissions: **Fair**

- **Permissions**: You can grant individuals access to certain large areas of system information, such as a module, but cannot control permissions at a more detailed level than that.
- **Field-Level Permissions**: Cannot define user or group permissions on a field-by-field basis.

Mail-Merging Letters: **Fair**

- **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 Word templates through the system, without the need to export data. It also allows you to easily generate a merge file which can then be merged with Word for the Mac.
- **Mail-Merging on a Mac**: Lets you mail merge letters on a Mac through an easier-than-usual functionality to export a mail merge file. However, this requires more steps than the standard mail-merge functionality.
- **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**: Lets you log that a thank you letter was sent by returning to the saved merge in the system and running an update against all records in the merge list, but this step is not done automatically.
- **One-off Thank Yous**: Cannot print a single thank you letter from the gift-entry interface; all thank you letters must be created in a batch process.
- **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**: Cannot 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: **Excellent**

- **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**: Cannot 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. This is part of a very flexible feature that allows you set up emails to go out based on a number of different criteria, including date.
- **Email Server**: Emails are sent through the vendor's email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors' inboxes rather than their Spam filters.

- **Unsubscribes**: Donors can easily unsubscribe from emails without involving the organization.
- **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, like a Web form submission. You can also set up sequential emails, which are triggered over time (for instance, a user might receive one email immediately after submitting a form, and then another automatically a week later).

Querying: **Excellent**

- **General Querying Approach**: Lets you create powerful queries with comparative ease by choosing criteria from a well-organized interface.
- **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".
- **Expanding Queries**: Lets you easily limit or expand a query after you've generated the list by saving the query and editing it again.
- **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 any field in the database for the list, or export the list.

Reporting: **Excellent**

- **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). However, they offer few standard reports compared to other reviewed systems—the system is designed to allow most reports to be built by the user. Z2 will help create critical reports during installation.
- **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, but you cannot see the 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**: Supports ad hoc reports within the system which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos and headers.
- **Custom Fields in Ad-hoc Reports**: Custom fields can be displayed within ad-hoc reports.
- **Saving Reports**: Lets you save reports that you create or modify.
- **List of Favorite Reports**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Exporting Reports**: Lets you export reports to Excel or CSV formats, among others.

Payment and Web Site Integration: **Excellent**

- **Processing Credit Cards**: Lets you charge donors' credit cards and online check payments 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 Web site.
- **Online Payments**: Lets you set up an online payment form on your Web site and pull online payments automatically into your database. They offer a complete form builder that allows you to create an unlimited number of forms, and fully customize their fields, their position and order.

- **De-duping Online Actions**: Online sign-ups or payments are logged to donors' existing payment records by matching the name and/or email address. You can then manage both the matched and unmatched donors through an interface.
- **Event Registration**: Lets you hold online registration 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.
- **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.
- **Membership Dues**: Lets members pay membership dues online. Members can also log in and manage their contact info, profile and some measure of transactions as well.
- **Shopping Cart**: Lets supporters purchase multiple items at once, as through a shopping cart.
- **Payment Form Customization**: Vendor provides an online payment form which they customize to completely match your Web site without additional charge.
- **Transaction Fees**: Vendor does not charge a transaction fee for each payment. The vendor will help you to set up a merchant account, which charges fees that range from 2.14 – 2.9 percent of every transaction. Online check payments are $0.35 per check.
- **Refunds**: You must issue refunds through the merchant account, and then log the refund into the system manually.

Tracking Events: **Good**

- **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 number of people per table, and the amount of gifts raised per table, but not the specific seating arrangements.
- **Nametags**: Lets you easily create nametags for an event via segmentation, and merge to Word template.
- **On-Site Registration**: Can quickly mark those attending as having arrived by clicking next to their name in the registration roster.

Tracking Other Built-In Interactions: **Excellent**

- **Volunteer Interests**: Does not provide any specific functionality to track interests in order to match volunteers with jobs, although this could be created through custom fields
- **Volunteer Work Tracking**: Lets you log volunteer activity for supporters, including date, duration, tasks, mileage and expenses, but no dollar equivalent for their time. You could use either an "activities/tasks" function or a "timesheet" function for this purpose, rather than specific volunteer functionality.
- **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 support for a number of other areas. It supports timesheets and project management, and the creation of surveys. It has full online store functionality with basic inventory and fulfillment tracking.

Customization: **Good**

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.
- **Custom Fields**: Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields**: Cannot rename existing fields.
- **Moving or Deleting Fields**: Cannot move or delete existing fields.
- **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), using the Form Builder.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration: **Fair**

- **Existing Integrations**: Can automatically exchange data with phpBB.
- **Data Export**: Lets you export all data visible to users into another file format, such as .XLS, .PDF or .CSV
- **Data Import**: Lets you easily map different files of donor, but not gift information, to the proper fields in the system, and import the data. The vendor can import gift data upon setup, or can create a custom import module to import donations from spreadsheet in a set format at additional cost.
- **Programmatic Integration**: Provides an API to allow a programmer access to a very basic set of data, in order to create custom data feeds.

Accounting Support: **Fair**

- **Existing Integrations**: Does not have any existing integrations with any accounting systems.
- **Approach to Batching**: Does not help you to create batches of payments per se, to ease the reconciliation process with an accounting system. You can create a query and run an export, and potentially mark gifts as part of a batch with a custom field, but this does not provide as much functionality as a typically batching process.
- **Reconciling a Batch**: Cannot mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations**: There are no controls in place to prevent someone from editing a payment that has already been reconciled, and thus throwing the system out of balance with the accounting system.

Ease of Use: **Good**

- **Ease of Use for Novices**: Moderate. The organization of the system relies on many different screens, each with lots of screens and buttons. There's a lot of information on each page, making it sometimes difficult to find features or fields. Less technically savvy users may feel initially overwhelmed.
- **Speed for Expert Users**: Moderate. Once you get used to the interface, it will be much faster to get things done, but there are still a lot of screens and fields to navigate through for many tasks. It doesn't provide a lot of specific functionality to make common tasks faster.

Support and Training: **Good**

- **Training**: Vendor provides initial training at no additional cost, and additional live training sessions can be scheduled for $250 for Web training, or $1,500 for onsite training. Training videos are available without cost.
- **Manuals and Documentation**: Provides an online library with dozens of videos and written documents.
- **Support**: Email support is $15 per month for unlimited support, while unlimited phone support is $95 per month. You can also purchase support at $65 for two hours of help.

Installation and Maintenance: **Excellent**

- **Installation and Maintenance**: 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, connectivity to the Internet, and updates.

Product Background: **Good**

- **History**: Vendor has been in business for five years; Neon has been in use by clients for five years.
- **Clients**: Vendor reports about 370-plus clients for this particular package.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
- **Roadmap**: The system is under substantial development. The vendor reports plans to launch soft credit and split gift functionality in April 2009, custom prospecting functionality in May 2009, Quick Batch Gift Entry in June 2009, and field level security and a Quickbooks export in September 2009.

ORANGE LEAP MPX
BY ORANGE LEAP

www.orangeleap.com

Formerly known as MPower, the open source Orange Leap provides useful functionality for tracking gifts and donor information, email and custom fields, with strong support for mail-merging letters and accounting controls. Querying and reporting are also particular strengths. The system doesn't support any online payments out-of-the-box, but an API would allow a programmer to integrate this or other functionalities. It's a powerful system that is more complex than most we reviewed, but it does a reasonably good job of arranging fields and screens in intuitive ways. And if you use the installed version, access to the source code allows any qualified programmer to make modifications. The vendor provides a version that both is installed on your local server and made available via terminal services to your desktop PCs, which is free to download (not including the cost of the server itself), or $1,188 per user per year for Orange Leap support, training and feature updates from the community. It also offers a hosted version for $1,668 per user per year, including support. Note that Orange Leap has another hosted product, simply called Orange Leap. This product is somewhat less expensive for somewhat less-robust functionality. As it was just released in March 2009, it did not have the 100 clients to qualify it for inclusion in this report.

The Basics

- **Technical Setup**: Available on PC desktops via terminal services. The system can be installed on a local server—which will require the purchase of a server and some technical expertise to get it set up—or hosted by Orange Leap.
- **Pricing**: The system is open source and available to be downloaded and installed on your server without charge (except for the cost of the server itself). Orange Leap support, training, conversion help and feature updates from the community are $1,188 per user per year. Orange Leap can also host the entire system for you for $1,668 per user per year, including support.

Adding and Tracking Donations: **Good**

- **Quick Search**: Lets you search the database for an existing person using a form that searches name fields (including a Soundex search, so that correct spelling isn't critical), address and codes, but only from the People or Transaction search screens.
- **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 address.
- **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 must be entered as part of a defined batch by the user. Batches are reconciled by matching the control amount with the "actual" amount for the system to post.
- **Gift Quick-Entry Interface**: Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface. You can tailor the defaults for a particular set of gifts, but you can't change the fields on the fly. You can also scan checks to allow you to quickly view them and enter the gift data. The scans are then linked to the gift.
- **Updating Donor Info via Quick Entry**: The 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.
- **Adding Pledges**: Lets you enter pledges for future gifts, including the amount and scheduled date. Each pledge must be entered by hand, as opposed to being generated based on a payment schedule.

- **Viewing Pledges on Gift Entry**: When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so.
- **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 special type of relationship called a "matching gift relationship." The pledge itself needs to be added to the matching donor by hand, but the relationship allows you to see the association and to create queries based on it.
- **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.
- **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 freeform notes to a gift. An additional "non-printable" notes field can be used for "private" notes that should not be shown in reports.
- **Organizational gifts**: Lets you associate gifts with an organization as opposed to individuals.

Managing Donor Information: **Good**

- **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 mark that a particular person should not be contacted, but staff must check a particular field to see it.
- **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 relationships.
- **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.
- **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 freeform notes about donors, but it's difficult to enter and view a large quantity of notes.
- **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 that there has been recent activity or communications with a donor, but you must toggle through a number of different views in a summary page to see it.
- **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.

Prospecting and Proposals: **Good**

- **Prospecting Workflow**: Lets you assign both a priority and a stage to a donor to manage a prospecting workflow, but only using custom fields. There is also a "Project" functionality which allows you to track tasks and dates for prospects, which would work effectively to track a major donor or other common donor processes.

- **Ticklers**: Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently in the "My Tasks" list on every screen at the appropriate time.
- **Creating Ticklers for Others**: Lets you create a reminder for someone else to do a task on a particular date, with links to project management functionality.
- **Donor Research**: Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority.
- **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 creating a segmentation.
- **Proposal tracking**: Lets you track what proposals are due, what you've submitted and what has already been approved by a particular foundation. You would build this using the included Project module.
- **Foundation Interest Tracking**: Cannot track a particular foundation's interest areas based on your organization's custom categories of interest without using custom fields.

Permissions: **Excellent**

- **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.

Mail-Merging Letters: **Excellent**

- **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 Word templates through the system, without the need to export data.
- **Mail-Merging on a Mac**: Cannot mail merge letters on a Mac, as this is a PC-based system.
- **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 when you confirm that a batch of letters were printed.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift-entry interface by choosing from a number of letter templates.
- **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: **Good**

- **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**: Cannot 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**: Cannot schedule email to send in the future.
- **Email Server**: Emails are sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted.
- **Unsubscribes**: Donors must contact the organization to unsubscribe from emails.
- **Email Reports**: Does not provide any reports to help you understand how many opens or clicks an email generated.
- **Automatic Emails**: Cannot set up automatic emails based on certain events, like a Web form submission.

Querying: **Excellent**

- **General Querying Approach**: Lets you create powerful queries with comparative ease. The interface looks a bit technical, but is comparatively intuitive—you select a field and enter the value and operator for that field to create criteria. You can then order and group a number of criteria to determine how to narrow the results.
- **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 comparatively easy to use functionality in this area—you can order and group a number of criteria to determine how to narrow the results.
- **Expanding Queries**: Lets you easily limit or expand a query after you've generated the list by saving the query and editing it again.
- **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 any field in the database for the list, export the list or view report and charts.

Reporting: **Excellent**

- **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, but you cannot see the 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**: Supports ad hoc reports within the system which can include and filter by nearly any field displayed to users. (This ad-hoc tool was released very recently, and we weren't able to review it.)
- **Custom Fields in Ad-hoc Reports**: Custom fields can be displayed within ad-hoc reports.
- **Saving Reports**: Lets you save reports that you create or modify.
- **List of Favorite Reports**: Cannot quickly view favorite reports without navigating a much larger set.
- **Exporting Reports**: Lets you export reports to XML, DBase or CSV formats, among others.

Payment and Web Site Integration: **Fair**

- **Processing Credit Cards**: Lets you charge donors' credit cards within the system. The vendor will help you set this up without charge.
- **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**: Does not provide an out-of-the-box way for people to sign up for your email list from your Web

site. However, vendor provides an API that a programmer could use to integrate a Web form with the system.

- **Online Payments**: Has a partnership with an online payment vendor to let you collect data that can be easily imported into your database by hand, but not automatically. However, they provide an API that a programmer could use to integrate the data with the system.

Tracking Events: **Excellent**

- **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 names of table captains, seating arrangements and the amount of gifts raised per table.
- **Nametags**: Lets you create nametags for an event via the standard mail merge process.
- **On-Site Registration**: Does not provide any specific functionality to support on-site registration.

Tracking Other Built-In Interactions: **Good**

- **Volunteer Interests**: Does not provide any specific functionality to log volunteer activity for supporters, although this could be created through custom fields or by modifying the source code if you are using the installed system.
- **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 pledge-a-thon functionality targeted towards media and radio fund drives.

Customization: **Fair to Good**

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.
- **Custom Fields**: Lets you add a limited number of custom fields without programming expertise. If you are using the installed system, a qualified programmer could add as many fields as desired.
- **Renaming Fields**: Cannot rename existing fields if you are using the hosted system. If you are using the installed system, a qualified programmer could rename fields by modifying the source code.
- **Moving or Deleting Fields**: Cannot move or delete existing fields if you are using the hosted system. If you are using the installed system, a qualified programmer could move or delete fields by modifying the source code.
- **Custom Constituent Interactions**: Does not provide any specific functionality to create custom interactions, in order to track multiple pieces of data about a single interaction. A qualified programmer could add whatever functionality is desired, if you are using the installed version.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn't often do so. Any qualified programmer can make any necessary changes to the installed system, but it's likely to be challenging to find one with extensive experience with the system.
- **Access to Source Code**: The application is open source; anyone may modify the source code to update or add functionality. While this is true of both the hosted and installed version, one set of source code supports all of the hosted clients. If you wanted to create enhancements likely to be useful to all, Orange Leap could potentially pull that into the shared source code. However, you won't be able to customize the hosted application through the source code to tailor it to your own needs.

Integration: **Excellent**

- **Existing Integrations**: Can automatically exchange data with Satori and several payment processors.
- **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.
- **Programmatic Integration**: Provides an API and the full source code to allow a programmer to create custom data feeds to an external system.

Accounting Support: **Excellent**

- **Existing Integrations**: Lets you automatically export data to MiP, and can export to accounting format using excel standard for QuickBooks.
- **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**: Lets you mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations**: Once a payment has been reconciled, it cannot be edited. If you make a mistake in the amount of a gift, you can create an error batch—for instance, with a negative gift for a donor—to balance out the mistake.

Ease of Use: **Good**

- **Ease of Use for Novices**: Moderate. Many of the screens appear crowded; extensive use of the same color on every screen can make them hard to parse. The query tool is easier to use than many, but will still require training for many users.
- **Speed for Expert Users**: Moderate. Those with experience with the system will find it easier to use, and will appreciate the power of the querying tool, but may wish for additional easy-to-setup functionality to support custom workflows, or better ease repetitive tasks.

Support and Training: **Excellent**

- **Training**: Vendor provides initial training via the Internet at no additional cost, and additional training sessions can be scheduled at additional cost.
- **Manuals and Documentation**: Provides an online help section, including a wiki that is open to both users and staff. Vendor also provides a manual.
- **Support**: Vendor provides unlimited phone or email support without additional cost.

Installation and Maintenance: **Fair to Excellent**

- **Installation and Maintenance**: If using the installed system, you will need to purchase a server specifically for the system, and install the system using a comparatively complicated terminal services approach. You will likely want someone with technical expertise to help get it set up and help maintain it. You will need to maintain your own infrastructure and install your own updates. If using the hosted system, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure, connectivity to the internet, and updates.

Product Background: **Good**

- **History**: Vendor has been in business since 2001; the Orange Leap MPX platform has been in use since 2004.
- **Clients**: Vendor reports about 300-plus clients for this particular package.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
- **Roadmap**: Orange Leap has recently released a different hosted product, simply called Orange Leap. This product is somewhat less expensive for somewhat less-robust functionality. MPX will also be actively supported. As an open source system, the roadmap is informed by what the community wants to build, and there's a number of new features in development.

SAGE FUNDRAISING 50
BY SAGE

www.sagenonprofit.com/products/fundraising/

Fundraising 50 has a unique interface designed to look like an index card. It's quite clean and usable, with friendly support even for complex functionality like querying, and is likely to appeal to less-technically savvy users. It's one of the strongest systems we reviewed in gift and donor tracking functionality, and also provides support for events, volunteers and membership data, all for the base price. Mail-merged letters, email, reporting and online payment functionality are all solid. The system supports custom fields, but is otherwise somewhat-less-configurable than some systems—all custom fields need to be displayed on specific custom field screens, and there's no way to delete or rename fields. The price is determined solely by the number of licenses purchased. One license is $3,400; two licenses are $4,650; and three licenses are $5,900. The yearly maintenance and support fee is 25 percent of the license cost.

The Basics

- **Technical Setup**: Installed onto PC desktop computers. Also available an online service hosted by Sage and made available via Citrix.
- **Pricing**: The price is determined solely by the number of licenses purchased. For the installed version, one license is $3,400; two licenses are $4,650; and three licenses are $5,900. The hosted version is $4,500 per year for one user, and $6,750 per year. The yearly maintenance and support fee is 25 percent of the license cost.

Adding and Tracking Donations: **Excellent**

- **Quick Search**: Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches full name, address, membership and other basic contact categories.
- **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 that match duplication parameters you set when configuring the system.
- **Adding a Gift**: Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. In addition, you can set default values for any data entry into the system.
- **Batching Gifts**: For ease of reconciling with accounting systems, donations may be entered as part of a batch by adding a batch name, or associated with a batch after entry by adding a batch name to the gift record. This functionality is quite basic.
- **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. This robust interface is set up in a spreadsheet-like format with customizable columns.
- **Updating Donor Info via Quick Entry**: The 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.
- **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 on a payment schedule, which you can then customize as needed. It will also automatically adjust the payment schedule as needed if a pledge is overpaid or underpaid.
- **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**: The lead staff member assigned to a donor is notified with a tickler when they open the

application, or by report when a pledge is near due.

- **Matching Gifts**: Lets you track matching gifts that need to be claimed from an employer by linking to the match record, which stores the ratio of the match for the organization. When you link to it, the system automatically creates a pledge.
- **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. Robust functionality in this area allows you to split the entire gift into up to five linked records, with each gift having a separate campaign, fund, appeal, etc.
- **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 freeform notes to a gift.
- **Organizational gifts**: Lets you associate gifts with an organization as opposed to individuals.

Managing Donor Information: **Excellent**

- **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. Uses colored "dots" on the top of the record to track various information that should be prominently displayed, and a highly visible Post It function for notes.
- **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 very prominent message as colored dots or as a very visible yellow Post It 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 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 relationships.
- **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.
- **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 freeform notes about donors, but it's difficult to enter and view a large quantity of notes, as the text box is not very large.
- **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.
- **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.

Prospecting and Proposals: **Good**

- **Prospecting Workflow**: Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. There's little ability to define and track a custom workflow, however.
- **Ticklers**: Lets you create a reminder for yourself for a particular task and date, but you must go to a particular screen or run a report at the appropriate time in order to see it.
- **Creating Ticklers for Others**: Lets you create a reminder for someone else to do a task on a particular date.

- **Donor Research**: Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority.
- **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 through segmentation, or by running a campaign hierarchy report where you can see who is associated at the campaign level and solicitation level across the entire campaign.
- **Proposal Tracking**: Lets you track what proposals are due, what you've submitted and what has already been approved by a particular foundation. You can track multiple proposals per foundation and assign staff to each proposal.
- **Foundation Interest Tracking**: Lets you track a particular foundation's interest areas based on your organization's custom categories of interest.

Permissions: **Good**

- **Permissions**: You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field-Level Permissions**: Cannot define user or group permissions on a field-by-field basis.

Mail-Merging Letters: **Good**

- **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 Word templates through the system, without the need to export data.
- **Mail-Merging on a Mac**: Cannot mail merge letters on a Mac, as this is a PC-based system.
- **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 when you confirm that a batch of letters were printed.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift-entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous**: Lets you query to find all those who need to be thanked (for example, by finding recent donors who have not yet been thanked), but you cannot specifically create a queue of thank you letters. Once you query, you can create letters for them all 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: **Good**

- **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**: You cannot create graphical emails in the system.

- **Scheduling Emails**: Lets you schedule email to send in the future.
- **Email Server**: Emails are sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted.
- **Unsubscribes**: Donors must contact the organization to unsubscribe from emails.
- **Email Reports**: Does not provide any reports to help you understand how many opens or clicks an email generated.
- **Automatic Emails**: The payment module lets you set up automatic emails based on donor payments, but cannot set up automatic emails based on any other events.

Querying: **Excellent**

- **General Querying Approach**: Lets you create powerful queries with comparative ease. The system focus on building reports, and you build queries as one piece of this functionality.
- **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".
- **Expanding Queries**: Lets you easily limit or expand a query after you've generated the list by saving the query and editing it again.
- **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 any field in the database for the list, or export the list.

Reporting: **Good**

- **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 in one report, including the donations compared to the 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**: Cannot create ad hoc reports in the system that allow you to chose what columns you want to include and add groups or totals. Nearly any field displayed to users can be queried and then exported for further formatting in Excel.
- **Custom Fields in Ad-hoc Reports**: Custom fields can be exported to use to create ad-hoc reports outside the system.
- **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 PDF, Excel or CSV formats, among others.

Payment and Web Site Integration: **Good**

- **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 Web site, with an extra module at additional cost.
- **Online Payments**: Lets you set up an online payment form on your Web site and pull online payments automatically

into your database, with an extra module at additional cost.

- **De-duping Online Actions**: Online sign-ups or payments are logged to donors' existing payment records by matching based on your configured de-duplication options.
- **Event Registration**: Cannot hold online registration for events.
- **Online Recurring Payments**: Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.
- **Distributed/ Team Fundraising**: Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.
- **Membership Dues**: Members cannot pay membership dues online.
- **Shopping Cart**: Does not support multiple purchases at the same time.
- **Payment Form Customization**: Vendor provides an online payment form which can be somewhat customized to match your Web site's colors and fonts, but not your Web site navigation, unless your own web-savvy programmer embeds it into your site.
- **Transaction Fees**: Vendor does not charge a transaction fee for each payment. They will help you to set up a merchant account, which charges 2.65 percent of each payment.
- **Refunds**: Lets you easily issue refunds through the system.

Tracking Events: **Good**

- **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 who is sitting at each table and the amount of gifts raised per table, but not the specific seating arrangements.
- **Nametags**: Lets you easily create nametags for an event via a report or a merge to Word template.
- **On-Site Registration**: Does not provide any specific functionality to support on-site registration.

Tracking Other Built-In Interactions: **Excellent**

- **Volunteer Interests**: Lets you track a detailed profile of someone's interests and aptitudes, including several different types of information, in order to match volunteers to jobs.
- **Volunteer Work Tracking**: Lets you log volunteer activity for supporters, including date, duration and tasks, as well as the dollar equivalent for their time.
- **Membership Tracking**: Provides functionality to track member levels, payments and expiration dates.
- **Other Built-In Interactions**: Does not provide built-in support for any constituent interactions other than what has been covered in this report.

Customization: **Fair**

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.
- **Custom Fields**: Lets you add an unlimited number of custom fields, but all the custom fields must be displayed on one of four custom field screens, or in an attributes list. There are also a set number of additional custom fields available on particular screens—for instance, you can add up to five custom fields to a gift, or six on an event.
- **Renaming Fields**: Cannot rename existing fields.
- **Moving or Deleting Fields**: Cannot move or delete existing fields.
- **Custom Constituent Interactions**: Cannot create custom interactions in order to track multiple linked 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 does not provide additional customization by altering the code of the system to meet specific client needs.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration: **Excellent**

- **Existing Integrations**: Does not automatically exchange data with any third-party systems beyond accounting systems at this time.
- **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.
- **Programmatic Integration**: Provides a direct ODBC database connection to allow a programmer to create custom data feeds to an external system from the underlying Microsoft SQL system.

Accounting Support: **Good**

- **Existing Integrations**: Lets you automatically export data to MiP (which is also a Sage product) or Peachtree, and can create a file format tailored to upload easily into QuickBooks.
- **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."
- **Controlling Reconciled Donations**: There are no controls in place to prevent someone from editing a payment that has already been reconciled. If you edit a payment and are using Sage MIP as your accounting package, a reversal will be sent to the G/L. If you're not using MIP, however, the system will be out of balance with the accounting system.

Ease of Use: **Excellent**

- **Ease of Use for Novices**: Moderate. The system has a intuitive layout, but it will take a bit of a learning curve to understand how all the pieces of the system fit together.
- **Speed for Expert Users**: Easy. Frequent users of the system will be able to do many common tasks fast and well. It's well organized, with lots of features for quickly entering and viewing data.

Support and Training: **Good**

- **Training**: Vendor provides training live or via the Internet, at additional cost.
- **Manuals and Documentation**: Provides an online manual.
- **Support**: Vendor provides unlimited phone or email support for a yearly fee of 25 percent of your license fee

Installation and Maintenance: **Good**

- **Installation and Maintenance**: 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.

Product Background: **Excellent**

- **History**: Vendor has been in business for 27 years; this version of Sage Fundraising 50 has been in use by clients since 2003. A previous version of the system (built in Paradigm) was in use prior to that.
- **Clients**: Vendor reports about 1,600 clients for this particular package.
- **Sustainability**: The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.
- **Roadmap**: The vendor reports it will have a continued commitment to improvements in reporting, ease of use and integrations to other complementary products such as online giving and event registration tools, and accounting products such as Sage MIP Fund Accounting.

TOTAL INFO
BY EASY-WARE

www.easy-ware.com

Total Info is a solid system, and will be particularly compelling for arts organizations looking for an integrated box office solution, but is a bit hampered by some usability issues. It has useful support for gift and donor tracking, emailing, querying and reporting, and for volunteers and events, and it has the most integrated and feature-rich mail-merge functionality of any system we reviewed. Relationship management and prospecting features are also particularly strong. It has only limited online donation capability, but also adds detailed theater-style ticketing and box office functionality—a very unusual feature. Between a fairly technical looking interface, an unusual layout and complex screens, less-technical users may initially find the system a bit overwhelming. You'll likely need a dedicated server for the system if you want more than two users, and then each person uses the system from their desktop via Remote Desktop Services. The infrastructure supports any kind of desktop computer, including Macs, but you'll want someone tech savvy to help install and support the system over time. A single user is $695 (not including the cost of the server), two users is $1,395, and three or more users is $2,095. Support is $240 for each user who needs to be able to call support.

The Basics

- **Technical Setup**: Installed onto a Windows server, using a Microsoft Access database, and shared with staff desktop computers (whether Windows, Linux or Mac) via Remote Desktop Services. This infrastructure is more complicated than that of most systems reviewed, and you'll likely want someone tech-savvy to set up and maintain the system.
- **Pricing**: The price is determined based solely on the number of users. A single user is $695, two users is $1,395, and three or more users is $2,095. Support is $240 for each user who needs to be able to call support. You'll also need a dedicated server for the system (the vendor estimates the cost of the server as under $1,500).

Adding and Tracking Donations: **Excellent**

- **Quick Search**: Lets you search the database for an existing person using a form that searches name and contact info.
- **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, maiden name or contact information. Names are matched on "name classes" (which would identify Judith Smith and Judy Smith as potential duplicates) as well as identical names.
- **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, donations may be entered as part of a batch by creating a batch name, then selecting it on gift entry, or associated with a batch after entry by editing the gift and selecting the appropriate batch.
- **Gift Quick-Entry Interface**: Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface. You first define up to six preset entry templates, each with different fields and default values as required. Then, when adding a gift, you can choose the appropriate template to auto fill the fields.
- **Updating Donor Info via Quick Entry**: The 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.

- **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 on a payment schedule.
- **Viewing Pledges on Gift Entry**: When using the interface to add new gifts, the system notifies you that a pledge exists.
- **Reminders for Pledges**: Staff members are notified with optional pop up reminders when the application starts, or when the donor contact record is first selected.
- **Matching Gifts**: Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge (for $0) against the employer when you enter the gift to be matched. The system also tracks the match rate.
- **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.
- **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 freeform notes to a gift.
- **Organizational gifts**: Lets you associate gifts with an organization as opposed to individuals.

Managing Donor Information: **Good**

- **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. Effective dates are specified in months, as opposed to an actual calendar day.
- **Do Not Contact**: Lets you display an optional, prominent message as a popup on the donor screen to notify staff that a particular person should not be contacted. Alternatively you can see this information on the donor screen.
- **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 a two-way relationship ("spouse") between donors, but not a one-way relationship ("would like to meet") or directional relationships ("boss; works for").
- **Viewing Relationships**: Lets you easily view everyone with whom a donor has relationships using a network view to see the degrees of separation between people in the network, and the total giving for their network. You can also email people directly from this network view.
- **Householding**: A database record describes a single individual and all their contact information and actions. In addition, each individual is part of at least one "Family". These families link together those in the same household or business. For each family, you define the head of the household who will receive mailings.
- **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 freeform 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 using the contact history screen.
- **Giving Totals**: Lets you easily see all recent gifts, in one click or less from the main donor page. You can drill down from that page to see the number and amount of gifts this year, or 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. Every individual is part of either a family or organization.

Prospecting and Proposals: **Excellent**

- **Prospecting Workflow**: Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. In addition, there is fairly advanced built-in functionality to manage major gift and capital campaigns. There's little ability to define and track a custom workflow, however.
- **Ticklers**: Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on startup of the application.
- **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.
- **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 segmentation report in the query interface.
- **Proposal Tracking**: Lets you track what proposals are due, what you've submitted and what has already been approved by a particular foundation. This functionality is very detailed, and includes likelihood, links to supporting docs, dates for a site visit and many other fields. Foundation Interest Tracking: Lets you track a particular foundation's interest areas based on your organization's custom categories of interest.

Permissions: **Good**

- **Permissions**: You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You cannot define user or group permissions on a field-by-field basis.

Mail-Merging Letters: **Excellent**

- **General Mail Merge Approach**: Lets you create and save letter templates within the system that include mail-merged information.
- **Mail-Merging on a Mac**: Lets you mail merge letters on a Mac. As all letters are mail-merged through the server, it doesn't matter what operating system is running on the desktop computer.
- **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 when you confirm that letters were printed.
- **One-off Thank Yous**: Lets you easily mail merge and print a single thank you letter from the gift-entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous**: Lets you build a queue of people to be thanked by marking their names at gift entry. You can then create letters for everyone in the queue at once, by using a "batch" mail merge process to find all gifts not yet acknowledged. Alternatively, you could run a query to do this.
- **Mail-Merging Gift Strings**: Lets you create letters that include custom gift strings based on a donor's previous giving history. There are a number of built-in "formulas" that you can use to control conditional output, like gift strings or conditional text.
- **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**: Automatically asks if you'd like to print labels for each letter printed. The system provides advanced functionality in this area. For instance, if you're using a printer supported by the system, you can also print specific labels on a page of partial labels, barcode envelopes, or print images on the envelope.

Emailing: **Good**

- **One-off Email**: Lets you easily send email to particular individuals from their donor records and from the network view of relationships to that donor.
- **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. The system uses the same sophisticated mail-merging tool for email as it does for printed letters, with a few additional email options (specify from/to address for instance).
- **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 send graphical emails if you create the appropriate HTML code outside the system, but not create or save templates.
- **Scheduling Emails**: Lets you schedule email to send in the future.
- **Email Server**: Emails are sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted.
- **Unsubscribes**: Donors must contact the organization to unsubscribe from emails.
- **Email Reports**: Does not provide any reports to help you understand how many opens or clicks an email generated.
- **Automatic Emails**: Lets you set up automatic emails based on certain events. For example, you can schedule an email based on a criteria built in the query interface, to email any new donors added in the past week.

Querying: **Good**

- **General Querying Approach**: Lets you create powerful queries, but the interface to do this is less intuitive than some other tools. As your first step in defining either a "Simple" or "Compound" query, you must first select a "data source" (i.e. some logical grouping of fields). Most users will requires training to understand what is in each data source.
- **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".
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- **Taking Actions on a List**: Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.

Reporting: **Excellent**

- **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 in one report, including the donations compared to the 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**: Supports ad hoc reports within the system which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos and headers.

- **Custom Fields in Ad-hoc Reports**: Custom fields can be displayed within ad-hoc reports.
- **Saving Reports**: Lets you save reports that you create or modify.
- **List of Favorite Reports**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Exporting Reports**: Lets you export reports to Excel, PDF, Word or CSV formats, among others.

Payment and Web Site Integration: **Fair**

- **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 Web site, via an existing integration with Formsite.com.
- **Online Payments**: Has a partnership with an online payment vendor to let you collect data that can be easily imported into your database by hand, but not automatically. Vendor partners with Formsite and Paypal for most payments, or PrintTixUSA for box office applications.
- **De-duping Online Actions**: Online sign-ups or payments are manually imported, and de-duped using the import functionality. Box office ticket payments are logged to donors' existing payment records by matching based on name, phone number, email address and mailing address.
- **Event Registration**: Lets you sell tickets for theater-style events, including multiple ticket prices (such as a VIP ticket) using a built in PrintTixUSA integration. Conference style online event registration is not supported except in a basic way through Formsite.com and PayPal customization.
- **Online Recurring Payments**: Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.
- **Distributed/ Team Fundraising**: Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.
- **Membership Dues**: Members cannot pay membership dues online in a way that is automatically integrated with the system.
- **Shopping Cart**: Does not support multiple purchases at the same time.
- **Payment Form Customization**: Vendor provides an online payment form (using Formsite.com) which can be somewhat customized to match your Web site's colors and fonts, but not your Web site navigation. The box office functionality offers more customization options.
- **Transaction Fees**: Vendor does not charge any transaction fees for payments supported through Formsite.com and PayPal, although you will need to pay typical PayPal fees. For online box office ticket functionality, the vendor charges the ticket purchaser a convenience fee, which covers the cost of all credit card fees.
- **Refunds**: Refunds for box office ticket purchased can be easily issued through the system. For other payments, you must issue refunds through Paypal and then log the refund into the system.

Tracking Events: **Good**

- **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 names of table captains and seating arrangements. You cannot track the amount of gifts raised per table except via a custom field.
- **Nametags**: Lets you create nametags for an event via their standard mail merge process.
- **On-Site Registration**: Provides functionality specifically to support selling tickets onsite (this functionality is geared toward the auction module, and all registrants are termed "bidders"). There is sophisticated support for ticketing and theater-style events.

Tracking Other Built-In Interactions: **Excellent**

- **Volunteer Interests**: Lets you track a detailed profile of someone's interests and aptitudes, including several different types of information, in order to match volunteers to jobs.
- **Volunteer Work Tracking**: Lets you log volunteer activity for supporters, including date, duration and tasks, as well as the dollar equivalent for their time.
- **Membership Tracking**: Provides functionality to track member levels, payments and expiration dates.
- **Other Built-In Interactions**: In addition to the interactions we've covered here, the system offers support for box office and ticketing functionality, as well as for walk-a-thons and other offline team-based fundraising, auction management, class and camp registration, economic development programs, legal case management, film festival management, pet tracking (as for animal shelters), and a point of sale system.

Customization: **Good**

- **Customizing Values**: Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.
- **Custom Fields**: Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields**: Cannot customize field names.
- **Moving or Deleting Fields**: Cannot move or delete existing fields.
- **Custom Constituent Interactions**: Cannot create custom interactions without vendor help, 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). The vendor reports that it frequently adds fields to support additional interactions upon request.
- **Vendor Customization**: Vendor reports that it often adds features or fields to customer requests without charge.
- **Access to Source Code**: Cannot access the source code in order to update or add functionality.

Integration: **Good**

- **Existing Integrations**: Can automatically exchange data with WealthEngine, formsite.com, PrintTixUSA and IATS.
- **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. Can do a batch import for the system install, and an "incremental" import for subsequent jobs that adds de-duplication functionality.
- **Programmatic Integration**: Does not allow a programmer to create custom data feeds to an external system.

Accounting Support: **Excellent**

- **Existing Integrations**: Lets you create a file format tailored to upload easily into QuickBooks. As you can set up G/L account numbers and classes in Total Info, this information can also be output and uploaded.
- **Approach to Batching**: Lets you create batches of payments in order to reconcile with an accounting system, including separate batches for checks, cash and credit payments.
- **Reconciling a Batch**: Lets you mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations**: Each gift record is "locked" after a thank you letter is printed or the batch is closed. Those who have permission to unlock a gift could then do so and update it.

Ease of Use: **Fair**

- **Ease of Use for Novices**: Complex. The system has a technical look to it, with a number of complex screens. The system layout is unusual, with a bottom navigation bar in many places. Many tasks can be done in a number of different ways, and with a number of different clicks, meaning it's not always clear how to do things. Many users will require training.

- **Speed for Expert Users**: Moderate. The system is feature-rich, which can speed a number of tasks, and there are a number of shortcuts for quickly entering data. However, a number of tasks require a lot of clicks and steps. By default, all ticklers and many informational messages appear in popup windows, which then need to be closed by hand. You can turn all these pop-up windows off, but it's not clear how information would then be proactively surfaced to your attention.

Support and Training: **Good**

- **Training**: Vendor provides training via the Internet at an additional cost of $75 per hour.
- **Manuals and Documentation**: Provides an online library with videos and written documents.
- **Support**: Vendor provides unlimited email and phone support for a yearly fee of $240 per year.

Installation and Maintenance: **Fair**

- **Installation and Maintenance**: In order to maintain the system, you will need to install the system on a dedicated a server (for two or more users), and set up a remote desktop for each networked client workstation. You will need to maintain this infrastructure, install your own updates and monitor your server speed to support the system.

Product Background: **Good**

- **History**: Vendor has been in business, and Total Info has been in use by clients, since 2001.
- **Clients**: Vendor reports about 400 clients for this particular package.
- **Sustainability**: The revenue earned from this donor management system covers the personnel and operational expenses required to support it.
- **Roadmap**: The vendor is working on expanding the online suite of products (online donations, registrations, memberships, volunteer sign up and others) and creating interfaces with a number of e-mail systems such as Vertical Response and Constant Contact.

APPENDIX A: **METHODOLOGY**

The research for this report followed a five-step process:

1. Define vendors to be included

Based on a preliminary scan of the marketplace, we defined that a system should be included in the report if:

- It's intended for use by small organizations as their only database to manage online and offline donors.
- An organization with one user and 500 donors could purchase it for less than $4,250 in the first year.
- More than 100 organizations in North America had actually purchased it for less than $4,250 as of October 2008, OR it was released in the last six months by a vendor currently serving more than 1,000 nonprofit organizations.
- It's in use by at least 50 organizations in North America who are not membership organizations, churches or temples (as there are a number of systems intended specifically to support these groups).
- Some official entity (whether vendor or an open source governance group) is proactively managing the continued development of the system.

We widely distributed invitations to vendors to fill out a preliminary survey about their systems, pricing and number of clients in order to be considered for inclusion. In addition, we proactively distributed the invitation via email to: all the vendors listed in NTEN's Donor Management Software Survey (including those written in as "Other") or the Campbell Rinker Donor and Member Database Survey; all donor management vendors identified in NTEN's and Idealware's databases; and all vendors personally known to Holly Ross, Laura Quinn, Eric Leland or Robert Weiner.

We then distributed an open invitation to participate through the Idealware and NTEN blogs and on a number of email discussion lists, including all of NTEN's national and local lists, Progressive Exchange, Information Systems Forum and FNDSVS.

Based on the data gathered in this preliminary survey, we identified 33 systems that met our criteria. This list of vendors was created prior to soliciting any vendor for funding for the report.

2. Interview subject matter experts

In December 2008, Idealware conducted hour-long telephone interviews with nine participants to investigate the primary factors important to nonprofits in selecting low cost donor management systems. Three of these interviewees were consultants who help nonprofits select these systems, and six were nonprofit staff members who had evaluated some of these systems for their own use. Using this data, we identified the key factors that are often important in selecting a system, and a list of frequently considered criteria.

3. Complete summary reviews

In January and February 2008, Idealware conducted half-hour demos of all 33 systems included in this report. Each vendor was sent some preliminary questions about their system and a list of six high-level tasks to be demoed; these questions and tasks were designed to investigate the factors most often identified as important. Based on these summary reviews, we created a rough preliminary scoring mechanism to compare the systems, and wrote a paragraph summarizing the strengths and weaknesses of each system.

Each summary paragraph was sent to the system vendor (or official representative) to allow them to flag errors, and revised to ensure there were no

inaccuracies. Vendors did not have any final approval over their own review, but we allowed them to opt for us to not publish their review at all. Only one vendor chose this option.

4. Identify the top systems

We selected 12 top systems to review in more detail based on our rough preliminary scoring mechanism. This scoring mechanism highly prioritized functionality to manage complex gift and donor information and to issue printed acknowledgement letters, but also considered usability, querying and reporting, configurability, managing constituent data beyond donations, and price.

5. Complete detailed reviews

For each of the 12 top systems, we conducted two- to three-hour demos based on a list of about 100 questions identified through our interviews. This data was summarized into a set of 127 standard criteria that we report for each system (in our Detailed Reviews of Low Cost Donor Management Systems document). We sent the review text based on these criteria to the vendors to allow them to flag errors, and revised them to ensure there were no inaccuracies. Vendors did not have any final approval over their own reviews.

Review criteria were grouped into 17 categories, and each system was given a rating for each category based on a rating framework (as defined in our How We Rated the Systems section).

After we conducted the detailed reviews, we dropped two systems from our official "top 10" as we could not be sure they were substantively more likely to be useful to those looking for donor management systems than other systems that we did not review in detail.

APPENDIX B:
HOW WE RATED THE SYSTEMS

The ratings for each system shown in the comparison chart were determined based on a detailed review and specific criteria, as shown below. For each category, the rating **None/ Not Applicable** means that it doesn't meet the criteria for a **Fair** rating.

Adding and Tracking Donations

FAIR	SOLID	EXCELLENT
• Lets you quickly search the database for an existing person. • Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. • Lets you enter pledges for future gifts, including the amount and scheduled date. • Can track a note on a gift. • Lets you add freeform notes to a gift. • Lets you associate gifts with an organization, as opposed to individuals.	• Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface OR Lets you easily map and import donor and gift information in custom file formats. • Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.	• Lets you find a person by searching data entered into custom fields. • When using the interface to add new gifts, the system asks if you want to apply them against existing pledges. • Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface which can be tailored with the appropriate fields and defaults for a particular set of gifts. • Lets you easily map and import donor and gift information in custom file formats without additional charge. • The system can create a full set of pledges based a payment schedule, which you can then customize as needed.

Managing Donor Information

FAIR	SOLID	EXCELLENT
• Lets you track at least four phone numbers and addresses for each donor, label them (for example, "office" and "cell phone"), mark the primary number and address, and track the donors' preferred contact methods. • Lets you track relationships between donors and label them (for example, "family member," "co-worker") with custom relationship types. • Lets you keep a manual log of communications such as phone calls or personal meetings. • Lets you mark that a particular person should not be contacted. • Lets you track the source of a particular donor.	• Lets you create a profile for an organization and track the people who work for it. • Automatically stores a record of all system-generated letters and emails for each donor.	• Lets you track people's seasonal addresses with effective dates, and automatically switches primary addresses for the appropriate timeframe. • 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. • Lets you easily see all recent communications and donor actions on one screen. • Provides specific householding functionality to allow you to easily segment out in a query a list of who should be mailed . • 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. • Lets you define directional relationships between donors ("boss; works for...") and the system automatically assigns the appropriate relationships for both donors.

Prospecting and Proposals

FAIR	SOLID	EXCELLENT
• Lets you assign both a priority and a stage to a donor to manage a prospecting workflow, at least through custom fields. • Lets you create a reminder for yourself for a particular task and date. • Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.	• Lets you assign both a priority and a stage to a donor to manage a prospecting workflow without custom fields OR Lets you define and track a custom workflow. • Lets you create reports that show all the asks that have been made. • Lets you track what proposals are due, what you've submitted and what has already been approved by a particular foundation OR Lets you track a particular foundation's interest areas based on your organization's custom categories of interest.	• Provides advanced built-in functionality to track prospects OR Provides detailed extensive functionality to define and track a custom workflow. • Can see reminders you or others have set prominently displayed at the appropriate time. • Automatically matches donor information to outside resources in order to provide more information on giving capability OR Provides historical analysis of past estimates to help you improve estimates.

Permissions

FAIR	SOLID	EXCELLENT
• Can define multiple user groups that have different access to system functionality.	• You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.	• Lets you define user or group permissions on a field-by-field basis.

Mail-Merging Letters

FAIR	SOLID	EXCELLENT
• Can mail merge data into letter templates without exporting data from the system. • Lets you print letters through the system for a particular group of people who meet a sophisticated set of criteria. • Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.	• Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed. • Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates. • Lets you easily print labels for a set of people from the same query result page used to print letters.	• Lets you create letters that include custom gift strings based on a donor's previous giving history. • Lets you flexibly create letter templates in Word with complete control over layout, formats, logos and images. • 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.

Emailing

FAIR	SOLID	EXCELLENT
• Lets you easily send email to particular individuals from their donor records. • Lets you send email through the system to a group of people who meet a sophisticated set of criteria.	• Lets you create and save graphical email templates to use in emailing groups OR Lets you schedule email to send in the future. • Lets you create individual and group email that includes both standard text and "mail merge" type inserted data.	• Lets you create and save graphical email templates to use in emailing groups. • Lets you schedule email to send in the future. • Emails are sent through the vendor's email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors' inboxes rather than their Spam filters. • Donors can easily unsubscribe from emails without involving the organization. • Lets you see the open rate, click-through rate and unsubscribe rate for each email.

Querying

FAIR	SOLID	EXCELLENT
• 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. • Lets you save queries to be run again later. • Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.	• Lets you query using criteria from any database field, including custom fields if included in the system. • Lets you create complicated queries using an unlimited number of criteria connected with logical "ands" and "ors". • Lets you easily limit or expand a query after you've generated the list by saving the query and editing it again.	• Lets you create powerful queries with comparative ease.

Reporting

FAIR	SOLID	EXCELLENT
• 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). • Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.	• Lets you save reports that you create or modify. • Lets you compare success metrics for a number of different campaigns. • Lets you export any report to a CSV or Excel format.	• Supports ad hoc reports within the system which can include and filter by nearly any field displayed to users, including custom fields. • Lets you quickly view favorite reports without navigating a much-larger set.

Payment and Web Site Integration

FAIR	SOLID	EXCELLENT
• Lets you charge donors' credit cards within the system.	• Lets you set up an online payment form on your Web site and pull online payments automatically into your database, without the need for a programmer.	• Lets people easily sign up for your email list via an integrated sign-up form on your Web site. • Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards. • Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) and meal options. • Lets members pay membership dues online.

Tracking Events

FAIR	SOLID	EXCELLENT
• Lets you track who has registered for a particular event, potentially with custom fields intended to track custom interactions. • Lets you easily create nametags for an event.	• Lets you track who has registered for a particular event without using custom fields.	• Lets you track non-paying guests for particular events, and distinguish them from those who paid. • Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table.

Tracking Other Built-In Interactions

FAIR	SOLID	EXCELLENT

• Provides at least substantial custom field functionality to allow you to reasonably support some basic volunteer or membership information.	• Provides two of the following:
	  • Lets you log volunteer activity for supporters, including date, duration and tasks.
	  • Provides functionality to track member levels, payments and expiration dates.
	  • Provides substantial built-in support for at least one interaction not covered in the report.
		• Provides three of the following
		  • Lets you track a detailed profile of someone's interests and aptitudes, in order to match volunteers to jobs.
		  • Lets you log volunteer activity for supporters, including date, duration and tasks, as well as the dollar equivalent for their time.
		  • Provides functionality to track member levels, payments and expiration dates.
		  • Provides substantial built-in support for a number of interactions not covered in the report.

Customization

FAIR	SOLID	EXCELLENT
• Lets you customize drop-down values for fields such as campaigns, type of relationships and many others. • Lets you add at least a few custom fields.	• Lets you add at least 50 custom fields. • Custom fields can be placed on many screens in the system. • Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction OR Vendor often adds fields or features to customer requests without charge.	• Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction, without the need for a programmer. • Lets you move existing fields within the interface, or delete them altogether.

Integration

FAIR	SOLID	EXCELLENT
• Can export all data visible to users and import donor and gift data OR Provides a method to allow a programmer to create custom data feeds to an external system.	• Lets you export all data visible to users into another file format. • Lets you map different files of donor and gift information to the proper fields in the system, among a variety of fields, and import the data. • Lets you import data without an additional charge.	• Lets you export all data visible to users into another file format. • Lets you map different files of donor and gift information to the proper fields in the system, and import the data. • Provides a method to allow a programmer to create custom data feeds to an external system, with access to most fields in the system.

Accounting Support

FAIR	SOLID	EXCELLENT
• Can export transactions in order to sync them with an accounting system.	• Can create and track accounting batches in order to ease the reconciliation process with an accounting system.	• Can mark a batch of payments as "reconciled with accounting." • There are controls in place to prevent unauthorized people from editing a payment that has already been reconciled.

Ease of Use

FAIR	SOLID	EXCELLENT
• Users can use the system, given enough training.	• The system is at least Moderately easy to use for both novices and experts.	• The system is at least Moderately easy to use for both novices and experts, and is Easy for one of these.

Support and Training

FAIR	SOLID	EXCELLENT
• Training and support is available, at least from the community. • Provides written documentation.	• Provides extensive documentation, including online documentation, a user community or videos. • Training and support is available from vendor, potentially at an additional charge.	• The vendor provides initial training over the Internet at no additional cost. • The vendor provides phone support for under $500 per year.

Ease of Installation and Maintenance

FAIR	SOLID	EXCELLENT
• The system can be installed and maintained by a reasonably qualified IT staff.	• 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, but no special IT skills (like the ability to configure and maintain a terminal services environment) are required.	• As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain.

Product Background

FAIR	SOLID	EXCELLENT
• The vendor reports more than 100 clients.	• The system has been in use for more than three years OR The vendor reports more than 500 clients. • The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.	• The vendor reports more than 1,000 clients. • The system has been in use for more than five years.

APPENDIX C: AUTHORS AND CONTENT CONTRIBUTORS

Authors

Eric Leland, FivePaths

Through his work at FivePaths, Eric consults with small- and medium-sized organizations to help them choose and implement appropriate technology solutions—including donor management systems. Eric conducted all of the initial interviews for this report, some of the summary reviews, all of the detailed reviews, and participated in analyzing, structuring and reviewing all report information. Eric has implemented CiviCRM, eTapestry, Giftworks, Metrix, Organizers Database, Salesforce.com and Salsa by DemocracyInAction for clients, and has additionally evaluated Donor Perfect, Neon by Z2, Sage Fundraising 50 and Telosa Exceed.

Laura Quinn, Idealware

Laura is the Executive Director of Idealware. She defined the methodology used for the report, wrote all interview and review questions, conducted some of the summary reviews and led all the analysis, recommendations, writing and comparisons in the report. She has used Salsa by DemocracyInAction extensively as Idealware's constituent database, evaluated Salesforce.com for Idealware's use, and has been interviewed by the Metrix team (prior to the foundation of Idealware) for input into their system design. Other than that, she has no experience using or implementing any of these systems.

Chris Bernard, Italics Media

Chris, a freelance writer at Italics Media, edited all of the text throughout the report. He has no experience using or implementing any of these systems.

Contributors

Jenny Council, netCorps

As a netCorps consultant, Jenny provides independent assistance with technology planning, selection, implementation and support, primarily to smaller nonprofit organizations. She has worked on a number of donor management selection and implement projects, including particularly substantial work with Salesforce.com and DonorPerfect. Jenny was interviewed for this report, and reviewed both the scenarios used in the recommendations section and a draft of the final report.

Shawn Michael, TACS/ NPower Oregon

Shawn assists both small and large nonprofit organizations with technology planning, database development, training and planning implementation. She reviewed both the scenarios used in the recommendations section and a draft of the final report.

Dan Shenk-Evans, Community IT Innovators

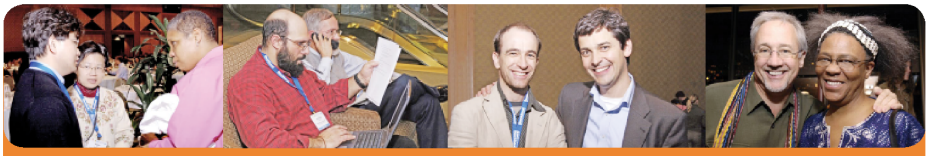
Dan has worked with about 50 different nonprofits—ranging from 3 to 75 staff members—to evaluate and implement donor, CRM, association membership, and accounting systems. He was interviewed for this report, and reviewed both the scenarios used in the recommendations section and a draft of the final report.

Robert Weiner, Robert L. Weiner Consulting

Robert is an independent consultant who has worked with a wide range of organizations—about 60 different clients, from small advocacy organization to large higher education groups—to define fundraising strategies and select donor management systems. He contributed to the laundry list of vendors invited to participate in the report, was interviewed, and reviewed both the scenarios used in the recommendations section and a draft of the final report. He has helped clients select about 10 different systems listed in this report, as well as more complex, expensive systems.

We are also grateful to the five nonprofit staff members who were interviewed to help us understand the factors that are typically important to nonprofits in choosing a low cost donor management system.

NTEN
Nonprofit Technology Network
http://nten.org



Because people who change the world need the tools to do it.

About NTEN: The Nonprofit Technology Network

What we believe
NTEN aspires to a world where all nonprofit organizations skillfully and confidently use technology to fulfill their missions. As the membership organization for the nonprofit technology community, NTEN plays a unique role in this field. Our work is to connect our members and provide you with learning and professional development. We give a bird's-eye view of the trends, issues, and opportunities that influence nonprofits' use of technology. Our ability to see the big picture and context allows us to identify common areas of opportunity and organize for action.

What we do
NTEN is a community of peers who share technology solutions across the sector and support each other's work. We enable our members to embrace advances in technology confidently through on- and off-line knowledge sharing, hands-on trainings, and research and industry analysis. Our discounts help our members stay up-to-date with changing technology and valuable resources. We offer news and pioneering industry research and are a channel for the dissemination of innovation and learning in this field.

NTEN WEBINARS / nten.org/webinars
NTEN hosts many online trainings and discussions each month on topics related to nonprofit technology.

ONLINE NETWORKING / groups.nten.org
Do you want to connect with other nonprofit webmasters, talk about open source CMS tools with others passionate about them, or learn ways to use Flickr in your next campaign? Then join one of these NTEN Affinity Groups (or a few of the more than 90 others) and start talking.

NTEN EVENTS / nten.org/events
Attend our conferences and local meet-ups where people like you come together to share experiences, learn, network, make deals, and have some fun.

NTEN Research / nten.org/research
Our industry-leading research is growing and expanding. We have recently published studies on IT Salaries and Investments in the nonprofit sector, the impact of technology consulting, and the challenges of data integration and Open APIs.

NEWSLETTERS / nten.org/signup
NTEN Connect is your opportunity to read about the latest issues from a variety of viewpoints.

NTEN BLOG / nten.org/blog
NTEN's blog is the place to find out about the latest resources, nonprofit tech news, and buzz from the NTEN community.

Managing Technology to Meet Your Mission is a practical resource that will help nonprofit professionals make smart, strategic decisions about technology. Get it today! www.meetyourmission.

idealware www.idealware.org

CANDID REVIEWS OF NONPROFIT SOFTWARE

Unbiased resources to help nonprofits choose effective software

Comparing Content Management Systems: WordPress, Joomla, Drupal and Plone

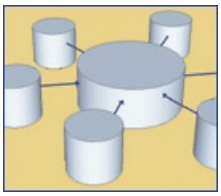
This 60-page report provides compares four free and open source systems that can help you to build and manage a Web site. We provide both a feature summary and detailed reviews, as well as a directory of consultants.

A Few Good Broadcast Email Tools

One of our most popular articles, now fully updated! Email newsletters, action alerts, or fundraising emails can be a very cost effective way to communicate with your supporters, but it can be complex to send and track thousands of emails. We talked to 11 nonprofit technology experts to find out what eNewsletter tools have worked well for them.

Should Your Organization Use Social Networking Sites?

Are social networking sites like MySpace or FaceBook likely to be a good fit for your nonprofit's goals? Brett Bonfield outlines some guidelines to help you decide if social neworking is right for you.



Creating the Relationship-Centric Organization: Nonprofit CRM

Are you storing data about your constituents in three, five, even 10 different databases? If so, you're not alone – but it's costing you in time, lost revenue and decreased impact. Paul Hagen describes how to get all your data into one place with an integrated CRM strategy.

And dozens of other articles, reports and resources, all free at www.idealware.org

Idealware provides Consumer-Reports-style reports, articles and online seminars to help you choose the software that will make you more effective.

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