

Preparing contributions reports for use in the Donor Manager

Prepared by John Muehleisen: john@donormanager.com www.donormanager.com

Introduction

The Donor Manager program (www.donormanager.com) is a free Windows based computer program written for to help those who raise their own support to track their partners and their contributions and to assist staff in developing more meaningful partnership relationships with their donors and other constituents.

The program will run under Linux and Mac OS with the appropriate emulators (but not in native mode).

I welcome the opportunity to add support for additional organizations to the Donor Manager program in order to extend its usefulness to more people. There is no cost to the missionary or the organization for this service.

Interface with organizational giving statements

Most organizations provide their staff with periodic (generally monthly) contributions reports in various formats. The Donor Manager has the ability to import many of these reports and automatically (or at least semi-automatically) post those contributions to donor records.

At the present, there is no "standard" format that the Donor Manager requires, although there are certainly formats that the Donor Manager prefers!

Each organization's contributions import routine is custom written. Many of these routines can be written in just a few minutes, others take hours, depending on the format of the contributions reports.

Reports that come in a predictable "data table" format (rows and columns) can be handled very easily. Reports that come as word processor files, PDFs, RTF files, HTML files are generally considerably more difficult for the Donor Manager to process. They are much easier for the staff member to read, however.

Having said that, here are some guidelines for those considering making their contributions information "Donor Manager friendly."

General Guidelines

1. A data table format is a much preferable format. Some formats that are very easy to implement include: .dbf, .csv, and .xls. Of course, xml is emerging as a new standard for the future, so the Donor Manager will support that as well.
2. Since an .xls format (Excel) is also very friendly to staff (most can open an Excel file using some program on their computer), that is probably the preferable format.
3. RTF and DOC files are very difficult to parse. HTML is a bit easier. PDF files cannot be directly processed, but the user can open a pdf, do a "select all" and "copy to clipboard" and the Donor Manager could be programmed to process the contents of the clipboard.
4. An ideal situation (from my perspective) would be to distribute the data in two formats: a viewer friendly format (eg: html or pdf), and another separate attachment of either a csv or xls (or perhaps xml) containing contribution data. This would help staff who have their own solution to tracking Contribution data as well.

Donor Manager Import Table Schema

The Donor Manager takes whatever data source file the organization uses, "massages" it into a common format, and then this intermediary table is used for the actual processing of contributions.

At the present, these are the fields that the Donor Manager currently uses. Note that only a few are actually required to post a contribution.

Column	Type	Length	Comments	Required
donorid	C	8	a unique donor id number assigned by the organization	Yes
name	C	60	the full name of the donor (could be a church name, or an individual, eg: Mr. and Mrs. John Smith)	Yes
name2	C	60	A second name line if needed	
address	C	60	mailing address line 1	
address2	C	60	mailing address line 2	
city	C	25	city name	
state	C	20	state / province / region	
zip	C	15	zip / postal code	
country	C	20	country	
date	D	8	gift date	Yes
amount	N	12,2	amount of gift	Yes
gifttype	C	20	organizationally defined. optional	
subtype	C	20	organizationally defined. not used by the DM currently	
comments	C	254	comments about the contribution.	
receipt	C	10	receipt number in the organization's system	
fundid	C	10	fund designation (defined by organization)	
fdscript	C	50	description of the fund id	
motive	C	10	motive / appeal code / optional	
mdscript	C	50	description of the motive / optional	

Note: There is a very HIGH probability that the next major update to the Donor Manager will change how names are stored. Most probably names will be stored in 3 fields:

- Title: eg: Mr. and Mrs., Miss, Dr. and Mrs., etc.
- First Name: eg: John
- Last Name: eg: Smith, Ph.D.

Then, the program will combine these programmatically into a "Display Name" and a "Save As" name. This is to support future synchronization with other programs.