

Donor Manager

Partner Development Software for
Missionaries
version 6

User's Guide

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July 2014

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1

Program Overview

The Donor Management software was designed to help missionaries who raise their own support keep track of their mailing list and increase their ability to respond well to their donors. Although primarily designed with missionaries in mind, it can be successfully used by others who raise their own financial support for their work.

Version 6 was released in June 2014 and contains a number of enhancements to previous releases of the program. This user's guide has been updated and expanded with this latest release and is intended to be a brief introduction to the program to help you get started.

The program is built around a database of names and addresses of donors and friends of your ministry.

There are a number of other files that attach to each donor record that keep track of notes concerning each donor, their donation history, special dates and events related to the donor like birthdays and anniversaries, and a record of your contacts with the person like telephone calls, visits, and support presentations etc.

In addition, the program is able to generate a number of reports to help you track and develop your ministry partner relationships, both while on Home Ministry Assignment and while on the field.

The program can be used to analyze your support base, calculate the support that you have raised and track pledges of support. The program will generate mailing labels, address envelopes, generate an e-mail address list for bulk e-mail newsletters, and will also export its data for use in other software programs and syncing with a tablet or smartphone.

Distribution

The Donor Manager, while copyrighted, can be freely copied and distributed within the missionary community at no charge. You can check for program updates at the donor manager website: www.donormanager.com. In addition, there is an option on the program main menu to check for program updates as well.

The entire program can be downloaded from the internet. The initial download for a new installation is about 7 mb in size. Subsequent program updates are much smaller – usually around 1 mb.

How to Get Help

If you need help installing the program, importing data, or using the program, please consult this user's guide and the additional tips available on the www.donormanager.com website. If you need additional help, want to report a bug, or suggest an enhancement or a new feature, please contact the programmer at john@donormanager.com. New features can be requested and bugs reported from the website as well.

Installation

The program comes with a standard Windows installation program that (by default) installs the Donor Manager into the folder: `c:\donor6`. You can change this default if you would like, but it is recommended to stay with this standard.

There are often problems, though, if the program is installed in `c:\Program Files` (or `c:\Program Files (x86)`). It is recommended that you do not install here.

The initial installation will install the donor manager program, the Visual FoxPro runtime support library, and some blank data files. If you are doing a program update, only the newest copy of the donor manager is installed. The runtime files are generally not needed, and your data files are maintained.

Starting the Program

When the program installs, it adds a program group to your Start menu titled "Donor Manager Software." This can be changed by the user at installation time if you prefer to have the program installed in another place on the start menu.

It is recommended that you create an additional shortcut on your desktop for the Donor Manager for convenience.

To start the Donor Manager, simply double click the desktop icon (if you created one) or start the program from the start menu (/Start /All Programs /Donor Manager Software /Donor Manager).

Importing Data from Another Program

If you have name and address information in another program, please refer to chapter 12 of this user's guide for detailed information on how to import your information into the Donor Manager.

If you have previously been using Donor Manager version 5.x, DM 6 can import your DM 5 data (leaving your DM 5 data untouched).

Navigating the Program

When the program starts, you will be presented with a main menu (or "home" page). This screen lists the most common functions of the program. In addition, there are standard "pull down" menus at the top of the screen that provide alternative routes to the parts of the program, and also contain infrequently used commands.

You can return to the "home" page at any time by clicking the "Home" button at the top of the main screen, or (more easily) by clicking anywhere on the title bar of each screen.

The screenshot shows the Donor Manager Home interface. At the top is a navigation bar with menu items: HOME, PARTNERS, DETAILS, CHURCHES, GROUPS, GIFTS, PARTNER DEVELOPMENT, REPORTS, CHARTS, E-MAIL, LISTS, TOOLS, and QUIT. Below this is a header for 'Donor Manager Home' with the user name 'John and Beth Muehleisen'. The main content area is divided into several sections:

- Ministry Partners:** Includes 'Ministry Partners Listing' (Browse a listing of all ministry partners), 'Partner Details' (View detailed information about one partner), 'Churches' (Churches and people associated with that church, Add a Partner), 'Print Reports' (Print & View Reports, Giving Analysis Reports, Envelopes, Mailing Labels), and 'Contributions' (Record Contributions, Monthly Giving Reports).
- Find Partner:** A search input field.
- Relationships & Support Goals:** Lists items like Partners Key Metrics, PEO Phases, Partnership Phases, Groups, Charts, Recent New Donors, Support Goals, Potential Partners, Follow Up Reminders, Special Days, Unthanked Gifts, and Recent Largest Gifts.
- Online:** Links to Check Online for Program Updates / Live Update, DonorManager.com, Docs, Tutorials, DM Forum, FAQ, and Tips.
- Data Tools:** Includes Data Transfer / Pack and Go, Backup & Restore, Data Maintenance, List Statistics, Export, and Import Names.

A summary bar at the bottom displays the following statistics:

\$7,220	84%	690	763	169	0
Total Support	% of Support Pledged	Total Active Partners	Total Supporters	Potential Partners	New in Past 60 Days

At the bottom of the page, it shows 'Thursday, July 24, 2014' on the left, 'What's New in 6.00 Build 86' in the center, and 'Contact | About | Quit' on the right.

The most commonly used program options are listed on the Home page. Often there are a number of options that you will have after selecting a home page option, and these will be discussed in later parts of this user's guide.

From the "Home" page, you can quickly find information about a particular partner simply by typing a few letters of their last name (or donor id number if

you know that) in the “Find” box. Note: you can quickly return to the Find box on the home page from most places in the program by pressing <Control-F>.

Personalizing the Program for Your Needs

When you first begin using the program, you need to do some personalization. Not all of the personalization options need to be set up at the beginning, but at the minimum, you will want to set the following options:

Your name and address

Your e-mail address

To begin personalizing the program, choose the “Settings” menu item from the home page.

When the “Settings / Tools” page comes up, click on the tab titled “My Information.” You will see the screen below:

The screenshot shows the 'Tools and Utilities' page of the Donor Manager software. The top navigation bar includes: HOME, PARTNERS, DETAILS, CHURCHES, GROUPS, GIFTS, PARTNER DEVELOPMENT, REPORTS, CHARTS, E-MAIL, LISTS, TOOLS (highlighted), and QUIT. The user name 'John and Beth Muehleisen' is displayed in the top right. The main content area is titled 'Personalize the Donor Manager' and contains a sidebar with 'Tools' (Backup & Restore, Program Settings, Lists and Codes, Table Statistics, Data Maintenance, Import Data into DM) and a main panel with 'My Information' and 'My E-Mail Information' sections. The 'My Information' section includes 'My Name and Address' with fields for User Name (John and Beth Muehleisen), Address (PO Box 948, Manon, IN 46952), and 'My E-Mail Information' with an E-Mail field (john@donormanager.com) and checkboxes for 'I use AOL for my E-Mail' and 'I use Thunderbird for E-Mail'. The 'Other Information' section has checkboxes for 'I am with WGM - use WGM Snapshot Tools' (checked) and 'I am with CCCU - use CCCU Tracking'.

On this page, you will want to set your name and address (this is used for envelope addressing) and your e-mail address (used for bulk e-mailing).

CCCU Options

In addition, if you are a missionary with the CCCU (Churches of Christ in Christian Union), the program has a number of additional options for CCCU missionaries. These options change how the program analyzes support totals to accommodate CCCU methods of support calculation.

Other Options

There are a number of other program options that can be set at any time from the Tools / Program Settings menu.

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Working with Partner Information

Partner Listing

The Partner's List gives you a list of all of the names and addresses that are in your file. If you're just getting started with the program, this list will, of course, be empty.

The screenshot shows the 'Ministry Partners' interface. At the top, there is a navigation bar with tabs: HOME, PARTNERS, DETAILS, CHURCHES, GROUPS, GIFTS, PARTNER DEVELOPMENT, REPORTS, CHARTS, E-MAIL, LISTS, TOOLS, and QUIT. The current user is identified as 'John and Beth Muehleisen'. Below the navigation bar, there is a search bar with 'Find' and a dropdown menu for 'Normal View'. A filter is set to 'All Names' with a 'Show All' button. The main area contains a table of partner information. The table has columns for Donor Name, City, Support, Frequency, Type, PEO Phase, PD Phase, and Church. The table lists 15 donors, with the row for 'Bowen, Andy and Lizet' highlighted in blue. A sidebar on the left contains various options like 'View Partner Details', 'Partner Tasks', 'Partner Views', 'Partner Reports', and 'Other Tasks'. At the bottom left, it shows '941 records'.

Donor Name	City	Support	Frequency	Type	PEO Phase	PD Phase	Church
Bishop, Mrs. C.J.		240	Annual	SU	Participant	Partner - Financi	
Blackburn, Mr and Mrs Roger D.	Florence, AL			SP	Spectator	n/a	Parkway Methodist Church, Florence,
Bobbie and Elaine Peed	Avon Park, FL			CH	Participant	n/a	First United Methodist Church, Avon F
Bobot, Mr. and Mrs. Steve	Saint Augustine, FL			SP	Participant	n/a	
Buhne, Mr and Mrs Brent R.	Lake Alfred, FL			SP	Participant	n/a	
Bohs, Helen K.	Johnstown, PA				Spectator	n/a	
Bonilla, Mrs Doris W.	Lancaster, KY				Participant	n/a	
Booker, Doris V Teece	East Sparta, OH				Participant	n/a	
Bosserl, Mr and Mrs Ivan				FO	Owner	n/a	Wesleyan
Bowen, Andy and Lizet	Brandon, MS	50	Month	SU	Engaged	Partner - Financi	
Bowie Chapel Independent Methodist Church	Eubank, KY		Month	SC	Participant	n/a	
Boyd, Rev and Mrs Michael A.	Roberta, GA			SP	Participant	n/a	Roberta Evangelistic Church, Roberta
Boyette, Mr. and Mrs. G.I.	Vanceleave, MS	100	Quarter	SU	Participant	Partner - financi	First United Methodist Church, Pascag
Branton, Bill and Hazel	Bathpool, Taunton, Som			WG	Engaged	n/a	
Bremer, Mrs Carroll R	Littlestown, PA				Spectator	n/a	
Breniser, Joe	MyTown, OH		Month		Engaged	n/a	
Britz, Mr. and Mrs. Miles			Annual	SU	Participant	n/a	

Tips on Importing Names and Addresses from Other Programs

If you have mailing list information in another program, the Donor Manager program can probably import your information to save you the trouble of retyping all of the information.

Using the pull down menus at the top of the screen, select /Tools /Import. The program can import name and address information from Outlook and from Excel files. Most other database programs (including Access) can save their tables in Excel format or CSV format.

Note: If you are importing information from Excel, the Excel file must be in Excel 5.0 / Excel 95 format. The default format is generally Excel 97 / 2003, so you will need to open the file in Excel and use “Save As” and change the file type to Excel 5.0 / Excel 95.

If you get an error message that says “Invalid file format” when trying to import Excel information, try saving the file as an Excel 5.0 file. That generally solves this problem.

For additional tips and step by step information on importing data from various programs, see chapter 12 of this user’s guide. You can also go to the Donor Manager website at www.donormanager.com and follow the links to “How Do I ... “

If you need help with this, feel free to contact support at john@donormanager.com.

This screen contains a list of all of the names, cities, and support information about each name in your mail in your mailing list. From this screen you can do a number of things. Near the top of the screen, you can click one of the letters there to quickly jump to the first name in your mail unless that name begins with that letter.

Another way to quickly find a record is to type the first few letters of the person’s last name in the “Find” box.

You can also choose the order in which the records are presented. You can view them in alphabetical order, or in ZIP code order. Using ZIP code orders is useful to see clusters of people who live near each other.

Filtering the Partners Listing

In addition, you can apply some “filters” to the list. From the pulldown menu titled “Filter” you have a number of ways to limit the names presented to you. For example, if you wanted just to work with those who have made a pledge to financially support your ministry, choose “Supporters Only” from the pull down list.

The screenshot shows the Donor Manager 6.00 Build 87 interface. The main window is titled "Ministry Partners" and contains a table of partner information. A "Filter" dropdown menu is open, showing various filter options. The table columns are Donor Name, City, Support, Frequency, and Type. The filter menu is currently set to "All Names".

Donor Name	City	Support	Frequency	Type
Barker, Mr. and Mrs. Norm				CH
Barnard, Mrs Norma D.				SG
Barnes, Mr and Mrs R B.	Crystal Springs, MS			WG
Barnett, Denise	Wellington, TX			FR
Barrager, Mr and Mrs Cliff T.	Emlenton, PA			FO
Barrett, Mr. and Mrs. J.A.	Tuscaloosa, AL			FO
Barrett, Rev. and Mrs. Alan				FO
Barris, Will and Jean	Uhrichsville, OH			SP
Bartels, Bernice	Tampa, FL	175	Month	SU
Bartolomeo, Mr and Mrs Marco	Auburn, AL			
Bassett, Ruthie	St Clairsville, OH			
Batchelor, Mr. Giles G.				SP
Bayler, Rev. and Mrs. LaVon E.	Kosciusko, MS	100	Monthly	SU
Beall, Mr and Mrs F Dan	Knox, PA	400	Annual	

The filter dropdown menu is open, showing the following options:

- All Names
- Pledged Partners only
- Active Partners only
- Inactive Partners only
- Churches only
- Donors only
- SU - Regular Support
- CA - Cash Donations
- LI - Life Investment
- SC - Supporting Chur
- CH - Church Non Supp
- FO - Former Support
- WG - WGM Staff
- MD - Major Donor
- SP - Special Gifts
-
- New Donor This Quarter
- New Donor This Year
- LYBUNTY: Last Year, But Unfortunately Not This Year
- SYBUNTY: Some Year, But Unfortunately Not This Year
- Former Supporte
- Hotlist
- Indian Springs
- Life Share
- Lead Info

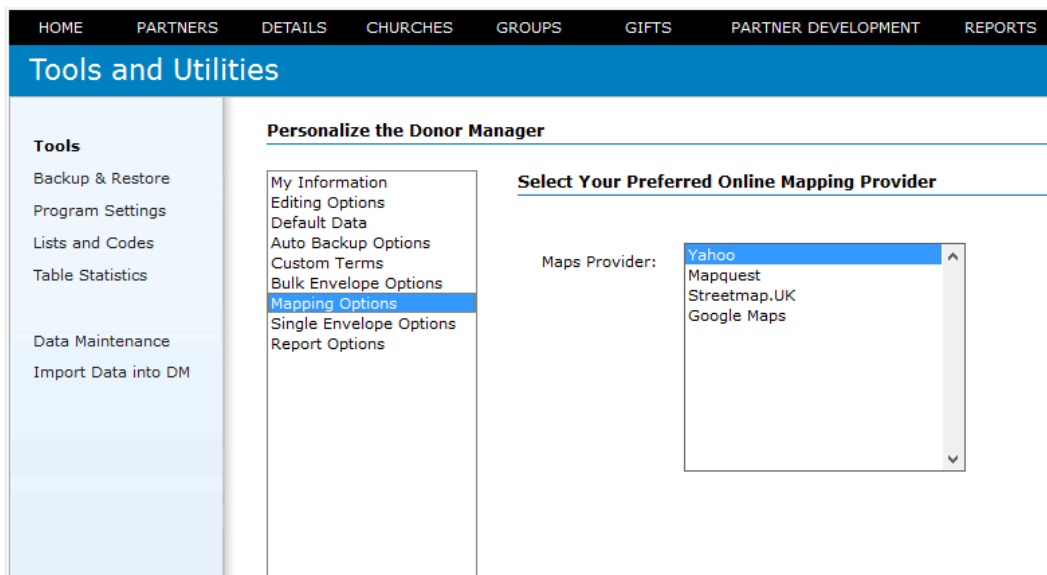
If you want to clear the filter and return the listing to showing all names on your list, simply click the “Show All” button and the filter will be cleared.

Getting a Map to a Partner's House

If you are online, or have access to the internet, you can get a map and driving directions to a ministry partner's house. Simply find the name of the partner you wish to map, and click the "Map" button at the bottom of the screen.

If you are online, you will be presented a map to the person's house with the option of getting driving directions. If you are not online, your computer will attempt to connect to the internet to get this information.

Note: you can change your preferred online map service in the Program settings.



Getting Detailed Partner Information

Once you have located the name of the person that you want to work with on the "Partners List" screen, you can move to the Detailed Information screen by either clicking the word "Details" on the menu near the top of the screen, or, simply by double clicking anywhere on that partner's line.

Partner Detail screen

The partner detail screen allows you to see specific information about one particular contact at a time. Let's take a look at each of the parts of this screen and give some information about the type of information you would keep in each of the fields.

Partner Information: Andy and Lizet Bowen John and Beth Muehlesen

Find

View List of Partners

Partner Tasks

- Add a new partner
- Map Address
- Put info on clipboard
- Print an envelope
- Send an e-mail

Other Tasks

- Merge Partner Records
- Delete this donor
- Clear Gift Link

972 records

Bill and Connie Strohmeier
 Bishop, Mrs. C.J.
 Blackburn, Mr and Mrs Roger D
 Bobbie and Elaine Peed
 Bobot, Mr. and Mrs. Steve
 Bohne, Mr and Mrs Brent R.
 Bohs, Helen K.
 Bonilla, Mrs Doris W.
 Booker, Dons V Teece
 Bossert, Mr and Mrs Ivan
Bowen, Andy and Lizet
 Bowie Chapel Independent Met
 Boyd, Rev and Mrs Michael A.
 Boyette, Mr. and Mrs. G.I.
 Branton, Bill and Hazel
 Bremner, Mrs Carroll R
 Breniser, Joe
 Brite, Mr. and Mrs. Miles
 Brockinton, Mrs Patricia
 Brown, Frank and Kelly

Name: Andy and Lizet Bowen
 Name 2:
 Address: 418 Bouchelle Dr
 Address 2:
 City: Brandon State: MS Zip: 39047-6739
 Country: USA Phone: 999-999-9999
 E-Mail: email@email.com

File As: Bowen, Andy and Lizet
 Donor ID: 21069
 Partner Type: Regular Support
 PEO Status: Engaged
 PD Phase: Partner - Financial
 Interest: High
 Potential: Medium

Is a Donor
 Is a Church
 Is a Prospect
 OK to Solicit
 OK to E-Mail
 Send Newsletter
 Is Active
 Is Deceased

Hotlist
 Need Info
 Need New Email Address

Partner Information Giving History Giving Details Graph Special Days Touches More Info Groups Address History

Dear: Andy and Lizet
 Church: Christian Fellowship Independent M
 Denomination: Independent
 Source: friend
 Alt Phone 2:
 Alt Phone 3:
 Family Info: w: Lizette c: Sue, Joseph, Kathy
 Occupation: software engineer
 Web Site:
 Support: \$0 /month
 Pledge Src: Next Step:

Notes: very interested in the African missionary training ministry

Select Photo File

first prev next last Add New Partner Put Address Info on the Clipboard Map Print an Envelope Send E-Mail Delete this Partner

Navigating through the partner records

When the detailed partner information is screen active, you can navigate through the partner records by clicking on the buttons in the bottom left-hand corner of the screen to go to the first record in the file, previous record, next record, and last record in the file. There are also buttons to click when you want to add a new partner, when you want to print an envelope for the partner whose record is on the screen, or to delete a partner whose information you don't need in your file any longer.

first prev next last Add New Partner Put Address Info on the Clipboard Map Print an Envelope Send E-Mail Delete this Partner

If you click the button titled "Clip", a copy of the partner's name and address information is placed onto the Windows clipboard. This is useful for pasting into other programs (e.g.: Word when writing a letter, pasting into an e-mail when someone asks you to send them John Smith's address, etc.).

The following information has been placed on the clipboard:

Robert and Charlotte Alman
 528 E Leake St
 Clinton, MS 39056-5380

Phone: 999-999-9999
 E-Mail: email@email.com

Partner Information

The first block of information in the upper left-hand side of the screen is basic contact information. Here you will enter the name of the contact (you can use up to two lines for this), up to two lines of address information, the city and state and zip code for this contact as well as the country they live in. You can also enter the contact's main phone number, and their e-mail address if you know it.

DETAILS	CHURCHES	GROUPS	GIFTS	PARTNER DEVELOPMENT	REPORTS	CHARTS	E-MAIL																																											
Information: Robert and Charlotte Alman																																																		
<ul style="list-style-type: none"> Akers, Mrs Emmagene Allen, Mr and Mrs Robert Allison, Ms Jane L. Alman, Robert and Charlotte Alspach, Mr and Mrs David Altman, Mr Donald 	<table border="1"> <tr><td>Name</td><td colspan="3">Robert and Charlotte Alman</td></tr> <tr><td>Name 2</td><td colspan="3"></td></tr> <tr><td>Address</td><td colspan="3">528 E Leake St</td></tr> <tr><td>Address 2</td><td colspan="3"></td></tr> <tr> <td>City</td> <td>Clinton</td> <td>State</td> <td>MS</td> <td>Zip</td> <td>39056-5380</td> </tr> <tr> <td>Country</td> <td>USA</td> <td>Phone</td> <td colspan="3">999-999-9999</td> </tr> <tr> <td>E-Mail</td> <td colspan="2">email@email.com</td> <td colspan="2"></td> <td>Send</td> </tr> </table>	Name	Robert and Charlotte Alman			Name 2				Address	528 E Leake St			Address 2				City	Clinton	State	MS	Zip	39056-5380	Country	USA	Phone	999-999-9999			E-Mail	email@email.com				Send	<table border="1"> <tr><td>File As</td><td>Alman, Robert and Charl</td></tr> <tr><td>Donor ID</td><td>941937</td></tr> <tr><td>Partner Type</td><td>Special Gifts</td></tr> <tr><td>PEO Status</td><td>Participant</td></tr> <tr><td>PD Phase</td><td>n/a</td></tr> <tr><td>Interest</td><td>Unknown</td></tr> <tr><td>Potential</td><td>Unknown</td></tr> </table>	File As	Alman, Robert and Charl	Donor ID	941937	Partner Type	Special Gifts	PEO Status	Participant	PD Phase	n/a	Interest	Unknown	Potential	Unknown
Name	Robert and Charlotte Alman																																																	
Name 2																																																		
Address	528 E Leake St																																																	
Address 2																																																		
City	Clinton	State	MS	Zip	39056-5380																																													
Country	USA	Phone	999-999-9999																																															
E-Mail	email@email.com				Send																																													
File As	Alman, Robert and Charl																																																	
Donor ID	941937																																																	
Partner Type	Special Gifts																																																	
PEO Status	Participant																																																	
PD Phase	n/a																																																	
Interest	Unknown																																																	
Potential	Unknown																																																	

The next block of information contains a bit more information about the donor.

“File As” name. The “file as” name is generally the last name of the donor, a comma, and then their first name. This determines the alphabetical ordering of the file.

Donor ID. In this field, put the partner's donor number if you know it. If you don't know it, simply leave this blank.

Donor type. You can set up a number of “types” of donors in a way that is meaningful to you. You can then assign each name to a particular category. The program, as it comes to you, has a number of pre-defined donor types: regular support, cash and gifts, Life Investment, not a donor, etc. You can add to this list additional categories that are meaningful to you.

PEO Status: PEO refers to “Participant / Engaged / Owner.” This approach to categorizing ministry partners is a helpful way of identifying the level of engagement that this person has in first of all your ministry, and in the “cause” which you are mutually involved in. There is also another status titled “Spectator.”

Spectator: the person knows about your ministry and is “watching” it, but is not really participating.

Participant: the person has in some way “participated” in your ministry ... through a donation or donations, taking regular financial support, coming to visit your area of work

(perhaps with a team). Essentially, they have taken some action which helps move the ministry forward

Engagement: Engagement is more than just a lot of “participation.” It involves a deeper level of embracing the ministry, your organization, and the cause.

Ownership: Here, the person considers himself / herself to have embraced your common “cause” and are actively promoting it within their sphere of influence.

For more information about this approach to partner development see the book *Coaching Your Champions* by Rev. Eric Foley.

Phase: In this field, indicate what phase of involvement this partner has with your ministry. There are a number of Partner Development phases listed. This field can be useful as you plan for ministry partner development and is also helpful in identifying the level of involvement this ministry partner has.

The screenshot shows a donor profile form with the following fields and values:

- Name: Robert and Charlotte Alman
- Name 2: (empty)
- Address: 528 E Leake St
- Address 2: (empty)
- City: Clinton, State: MS, Zip: 39056-5380
- Country: USA, Phone: 999-999-9999
- E-Mail: email@email.com
- File As: Alman, Robert and Charl
- Donor ID: 941937
- Partner Type: Special Gifts
- PEO Status: Participant
- PD Phase: n/a (dropdown menu is open showing options: n/a, Never Contacted, Ask in Future, Call for Appt, Appt Scheduled, Call for Decision, Partner - Financial, Partner - Prayer, Partner - Special, Not Interested, Never Ask)
- Interest: n/a
- Potential: (empty)

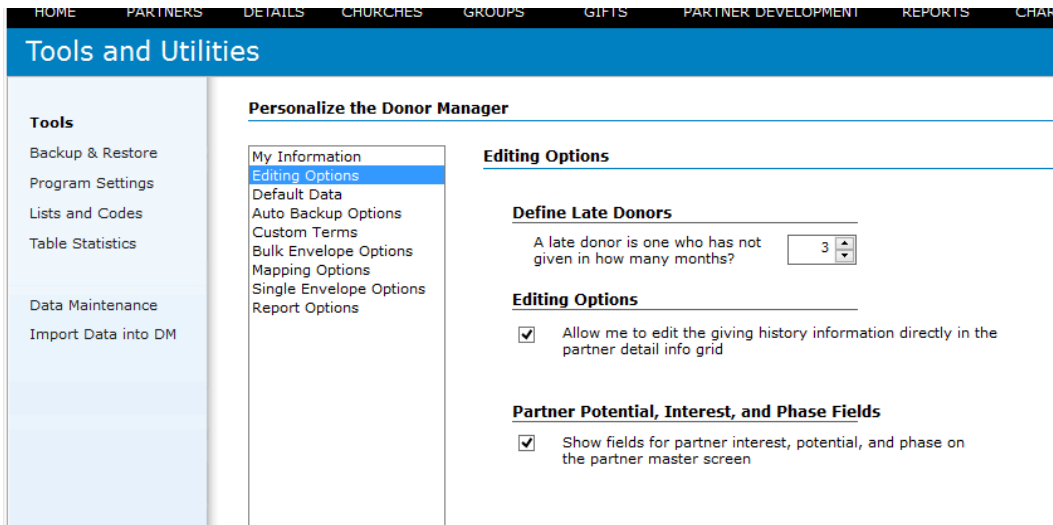
Below the form, there are tabs for Partner Information, Giving History, Giving Details, and Graph. The Partner Information tab is active. Below the tabs, there are fields for Dear (Robert and Charlotte), Church (Riverside IMC), and Denomination (Independent Methodist). A notes field contains the text "gave \$25".

Interest: In this field, indicate the level of interest this donor has in your ministry. You can set their interest level at low, medium, high, or very high. This information is often useful as you are planning your deputation schedule.

Potential: In this field, indicate your assessment of this partner’s potential to support your ministry financially.

Note: These four fields (Interest, Potential, PEO Status and PD Phase) are optional and can be turned off by the user. If you do not wish to use these fields

(or if you wish to “hide” them, they can be turned off from the /Tools /Personalize / Editing Options screen).



Partner Profile Information

On the upper right hand side of the detailed donor information screen, is a series of check boxes.

There are eight set lists that the program has set up for you. These are:

- Is a donor,
- Is a church,
- Is a Prospect,
- Is OK to solicit,
- OK to E-Mail,
- Send Newsletter
- Is Active, and
- Is Deceased.

Is a Donor	<input checked="" type="checkbox"/>
Is a Church	<input type="checkbox"/>
Is a Prospect	<input type="checkbox"/>
OK to Solicit	<input checked="" type="checkbox"/>
OK to E-Mail	<input checked="" type="checkbox"/>
Send Newsletter	<input checked="" type="checkbox"/>
Is Active	<input checked="" type="checkbox"/>
Is Deceased	<input type="checkbox"/>

In addition, for CCCU Staff, a seventh option is presented: Is a CCCU Supporter.

Is a Donor: If you consider this person a donor, be sure to put a check mark in the “is a donor” box.

Is a Church: Likewise if this contact is a church, indicate that. If there is a check in the “Is a Church” box, this contact will appear on the “Churches” page.

- Is a Prospect:** If you consider this contact to be a prospect whom you want to approach concerning support for your ministry, put a check in the “is a prospect box”.
- OK to Solicit:** Most of the names on your list will be names that you would be willing to solicit funds from. However, you may have a few names on your list that, for whatever reason, you do not wish to send fund-raising appeal letters to. If you do not wish to solicit funds from this contact, remove the check mark in the “OK to solicit” box.
- OK to E-Mail:** If you have an email address for a person, putting a check mark here will include this partner on your bulk e-mailings.
- Send Newsletter:** Putting a check mark here allows you to include this partner when preparing mailing labels or envelopes for newsletters.
- Is Active:** Putting a check mark here allows you to indicate that you consider this person to be an “active” name on your mailing list.
- Is Deceased:** Putting a check mark here will omit this persons name from many areas of the program. You want to keep their contribution activity (for financial summaries), but do not want labels / envelopes / etc. printed.

Additional Partner Information Pages

On the bottom half of the detailed donor information screen are nine tabbed pages that contain additional information about each contact / partner.

Partner Information: Andy and Lizet Bowen John and Beth Muehleisen

Find

View List of Partners

Partner Tasks

- Add a new partner
- Map Address
- Put info on clipboard
- Print an envelope
- Send an e-mail

Other Tasks

- Merge Partner Records
- Delete this donor
- Clear Gift Link

972 records

Bill and Connie Strohmeier
Bishop, Mrs. C.J.
Blackburn, Mr and Mrs Roger C.
Bobbie and Elaine Peed
Bobot, Mr. and Mrs. Steve
Bohne, Mr and Mrs Brent R.
Bohs, Helen K.
Bonilla, Mrs Doris W.
Booker, Doris V Teece
Bossert, Mr and Mrs Ivan
Bowen, Andy and Lizet
Bowie Chapel Independent Met
Boyd, Rev and Mrs Michael A.
Boyette, Mr. and Mrs. G.I.
Branton, Bill and Hazel
Bremer, Mrs Carroll R.
Breniser, Joe
Britz, Mr. and Mrs. Miles
Brookinton, Mrs Patricia
Brown, Frank and Kelly

Name: Andy and Lizet Bowen
Name 2: / /
Address: 418 Bouchelle Dr
Address 2:
City: Brandon State: MS Zip: 39047-6739
Country: USA Phone: 999-999-9999
E-Mail: email@email.com

File As: Bowen, Andy and Lizet
Donor ID: Z1069
Partner Type: Regular Support
PEO Status: Engaged
PD Phase: Partner - Financial
Interest: High
Potential: Medium

Is a Donor
Is a Church
Is a Prospect
OK to Solicit
OK to E-Mail
Send Newsletter
Is Active
Is Deceased
Hostlist
Need Info
Need New Email Address

Partner Information Giving History Giving Details Graph Special Days Touches More Info Groups Address History

Support	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
50	2014	25				25	25							75
Begins	2013	25	25	25	25	25	25	25	25	25	25	25	25	300
Ends	2012	25	25	25	25	25	25	25	25	25	25	25	25	300
First Gift	2011	25	25	25	25	25	25	25	25	25	25	25	25	275
Latest Gift	2010	25	25	25	25	25	25	25	25	25	25	25	25	300
Aug 02	2009	25	25	25	25	25	25	25	25	25	25	25	25	300
Largest Gift	2008	25	25	25	25	25	25	25	25	25	25	25	25	275
Aug 02	2007	25	25	25	25	25	25	25	25	25	25	25	25	275
Largest Gift	2006	25	25	25	25	25	25	25	25	25	25	25	25	250
Aug 02	2005	25	25	25	25	25	25	25	25	25	25	25	25	300

Total Giving: 4,575 # of Gifts: 137

Thank All Edit Giving Add Year Delete Year

first prev next last Add New Partner Put Address Info on the Clipboard Map Print an Envelope Send E-Mail Delete this Partner

The first page is titled “Partner Information.” Let’s take a look at each of the fields here.

The screenshot shows a web form titled "Partner Information" with a navigation menu at the top containing: Partner Information, Giving History, Giving Details, Graph, Special Days, Touches, More Info, Groups, and Address. The form fields are as follows:

- Dear: Robert and Charlotte
- Church: Riverside IMC (with a "Link" button)
- Denomination: Independent Methodist (dropdown menu)
- Source: Met at missions conference
- Alt Phone 2: Work Phone (dropdown), 777-999-5151
- Alt Phone 3: (empty dropdown)
- Family Info: Kids: Mary and Seth
- Occupation: Software engineer
- Web Site: (empty field with "Go" button)
- Support: 40 Month (dropdown), 40 /month
- Pledge Src: (empty dropdown), Next Step (empty field)

A "Notes" field on the right contains the text: "gave \$25 at service in June 2014, then took support". A "Select Photo File" button is located at the bottom right of the form.

Dear. In this field, put the greeting that you would normally use in a letter. In other words, what would you put after the word “Dear” in a letter? This information is used when creating mail merge letters. If you don’t intend to mail merge letters from the information in the donor manager, feel free to leave this field blank.

Church. In this field you can type the name of the church that this person is a part of. However, there’s also a button there titled link. If you click the “Link” button, the program will give you a list of all the churches that it recognizes in your system. You can then link that donor directly to a church. This is the preferred method, as it then allows the system to track the direct relationship between the donor and his church. When you go look at the churches screen in your system, if you have linked donors to a church, it will then give you a list of all the names of the people who are in that particular church. You can also get a report of each church and the list of people linked to that church.

Denomination: specify the denomination this supporter is a part of, if you know it. The program is able to use this information to do an analysis of your support based on the denomination so that you can tell how much of your support comes from people from each of these church backgrounds. (Note: you can easily change the list of denominations from the Tools / Codes / Denominations screen.)

Source. In this field, put some information about how this person’s name got on your mailing list. Perhaps you met them in the service, perhaps at one of the Celebrations, perhaps they came to the field on a work team or signed one of your

“I’m praying for you” cards. This field is just a reminder of how you came to know this person.

Alternate contacts. The next part of the screen allows you to specify up to two alternate ways of contacting people. Here’s the place for you to put in their work telephone or their cell telephone numbers or another e-mail address for them. You specify the type of contact and the information about the contact that works best for you.

Family information. The next field gives you an opportunity to put additional information about this particular contact’s family. You may want to put a spouse name in here, the names of children, and the other family information you may want to keep. If there’s not enough room in the family information area to record the details you want, you can put additional information in the Notes section.

Occupation. Record here any information you want to about the occupation of this contact.

Web Site: If this partner has a web site (often true for churches, and getting more often for individuals), you can indicate the web site address here. If you would like to go to their web site, click on the “Go” button to open the website in your browser (assuming that you are online).

Support. In the next section you record the amounts of support and the frequency of the support that this donor has pledged if they have become a regular supporter of your ministry. For example if a person has pledged \$25 per month you would put \$25 in the first field, and then change the next field to “monthly”. The program will translate this into a per month amount for donors who give less often than every month. For example you may have a donor who has pledged \$300 per year, but they might not give every month. You would record this pledge as \$300 per year. The program will convert that into \$25 per month.

Note for CCCU staff: If this partner has a pledge in your ministry, and you have the partner tagged as a “CCCU Supporter”, the program will calculate this partner’s pledge at 90% when doing total support calculations.

Next step. In this field, put a word that describes what is going to be the next step, if any, in your working with this contact in developing a relationship with them.

Notes. The next section of the screen gives you the opportunity to put unlimited notes. Put here any information that will be of use to you.

Giving Details

The “giving details” tab has the same donation information as the “Giving History” tab, but it is presented with one line per donation, rather than one line per giving year.

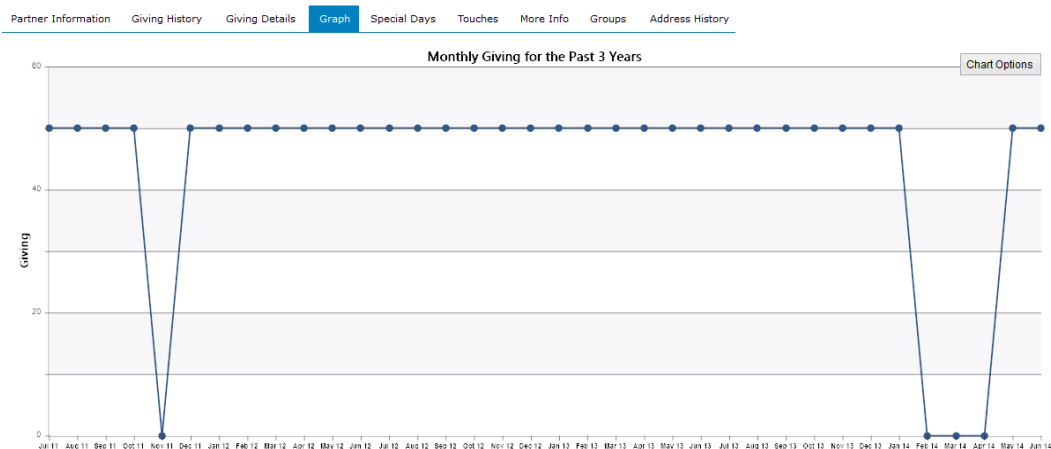
Partner Information Giving History **Giving Details** Graph Special Days Touches More Info Groups Address

Date	Receipt	Amount	Fund	Motive	Thanked
25-Jan-10	2561732	10.00			<input checked="" type="checkbox"/>
30-Nov-09	2550110	10.00			<input checked="" type="checkbox"/>
21-Oct-09	2543450	10.00			<input checked="" type="checkbox"/>
14-Sep-09	2536826	10.00			<input checked="" type="checkbox"/>
17-Aug-09	2531952	10.00			<input checked="" type="checkbox"/>
13-Jul-09	2525805	10.00			<input checked="" type="checkbox"/>
17-Jun-09	2520746	10.00			<input checked="" type="checkbox"/>
18-May-09	2514790	10.00			<input checked="" type="checkbox"/>
14-Apr-09	2508124	10.00			<input checked="" type="checkbox"/>
17-Feb-09	2496849	10.00			<input checked="" type="checkbox"/>
19-Jan-09		10.00			<input checked="" type="checkbox"/>

Delete Gift

Graph Tab

The graph tab shows a line chart giving a picture of a partner's donation activity for the past 3 years.



Special Days Tab

Many missionaries like to keep track of the special days in the lives of their supporters. Birthdays, anniversaries, and other events are useful bits of information to keep. If you keep this type of information, you would use this page to enter these events. The program then allows you to get a list of the events from

all of your contacts sorted by date to make it easier for you to send birthday cards, anniversary cards, e-mail notes, or however you choose to keep in contact with your supporters.

To record a new event, simply click on the button labeled “add event.” This will add a blank line to the screen and allow you to enter the month and day and the word describing the event (like “birthday” or “anniversary”), and an additional bit of description concerning this event, like the name of the specific family member.

MonthDay	Event	Description
3 12	Birthday	Will's Birthday
5 19	Birthday	Jean's Birthday
9 3	Anniversary	Will and Jean's Anniversary

The Touches Tab

Date	Type	Comment	Date	Type	Comment	Closed
02/19/13	Skype	20 minutes skype call / ministry update	/ /			<input type="checkbox"/>
07/25/12	Visit	Had lunch with Will / discussed support	/ /			<input type="checkbox"/>

This screen contains information about the various interactions or “touches” that you have had with this particular contact. You simply record the date, the type of contact (like “call” or “letter” or “visit”, etc.) and any notes or comments about that particular touch. This is particularly useful when you are wanting to record the history of phone calls or visits that you might make with this particular donor to record what you talked about, or how the meeting went, what results came from the meeting, especially if you’re dealing with the support raising issues.

You can also record follow-up information with each touch. For example, you may have called a donor and tried to set up an appointment for a one-on-one visit. They may have said that they needed to check with their spouse and that you should call them back in a few days and find out when would be a convenient time for you come to visit. You would record the details of your call to them in the touches section, and then you would record a date and some other notes about the need to do follow-up of that particular visit.

There’s a special screen in the program that lists all the details of the follow-ups that you have recorded. This will help you to keep track of the commitments that

you have made and follow contacts that you need to make in order to ensure that this item does not fall between the cracks.

If you wish to apply the same “touch” to a large number of records at the same time and all of them are on one of the Donor Manager lists, you can do that by clicking on “Apply Touch to Many Records.”

More Information Tab

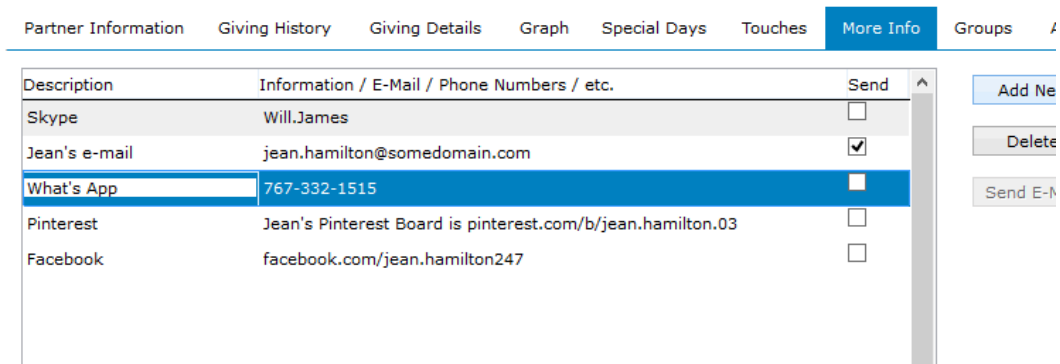
Often there are bits of information about a partner that you want to keep, but don't really “fit” anywhere else.

You can use the “more info” tab to record these.

Simply enter a descriptive title for the information, and then the details of the information.

For example, you might want to record additional phone numbers, Skype or Twitter names, etc.

If you enter an additional e-mail address here, you can put a check in the “Send E-mail” box and the DM will pull that as an additional email address when sending emails.



The screenshot shows the 'More Info' tab in the Donor Manager interface. The table below lists various pieces of information for a partner, with a 'Send' checkbox for each entry. The 'What's App' entry is highlighted in blue.

Description	Information / E-Mail / Phone Numbers / etc.	Send
Skype	Will.James	<input type="checkbox"/>
Jean's e-mail	jean.hamilton@somedomain.com	<input checked="" type="checkbox"/>
What's App	767-332-1515	<input type="checkbox"/>
Pinterest	Jean's Pinterest Board is pinterest.com/b/jean.hamilton.03	<input type="checkbox"/>
Facebook	facebook.com/jean.hamilton247	<input type="checkbox"/>

Groups

The Donor Manager allows you to create an unlimited number of custom partner “groups” which you can assign partners to.

So, for example, you could create a group for your home church Bible study group and then “tag” some partners as members of that group.

Or, you may create a group titled “Our Family” or “Prayer Partners” or “Our Mission Staff” or “Be sure to visit next time.”

Partner Information Giving History Giving Details Graph Special Days Touches More Info **Groups** Address History

This partner is a member of the following groups:

- Hotlist
- Indian Springs
- Need to Cultivate
- Pastor

◀ Add Group

Del Group ▶

Available groups (double click to add)

- Former Supporte
- Life Share
- Need Info
- Need New Email Address
- Our Family

Edit Groups

Address History

When a partner's address changes, and you are using the DM “automatic” gift posting feature, the DM can keep track of their previous addresses.

3

Working with Churches

The Churches screen

The Churches screen gives you a listing of each of the contacts in your database that you have tagged as being a “church.” In addition to listing the churches, it will also give you a list of each of the other contacts that you have linked to that church.

Name	City	State	Support
Mrs Marie Darrenkamp	Knox	PA	
Linda Sue Gilmore	Wilmore	KY	25
River Valley Christian Fellowst	Jackson	MS	
Diane Dismuke	Powder Springs	GA	250
Red and Joan Davis	Holland	MI	
Rev. and Mrs. Mark Doll	Madison	MS	
John and Nicole Curiale			

This is useful for when you want to take a look at your churches and see who is in your database that is linked to each of these particular congregations. You can view this information on the screen, or you can print it out on your printer. If you choose to do a printout, you have the choice of doing a printout for one church only, or for all the churches in your database.

You can go directly to a church's detail record by double clicking on its line in the church list. Likewise, you can go directly to the detail record of the people by clicking on the "Go" button on that person's line.

4

Recording Donations

If you choose to use the part of the program that tracks a donor's giving history, you will be entering the donation information from the gifts screen. As you get your printout each month, you'll want to enter this information so that the month by month giving history of the donor is kept up-to-date.

Contributions can be entered manually if you are working from a paper contributions report. In addition, the Donor Manager program can read in electronic contributions reports provided by a number of organizations, and these contributions can also be posted automatically by the program.

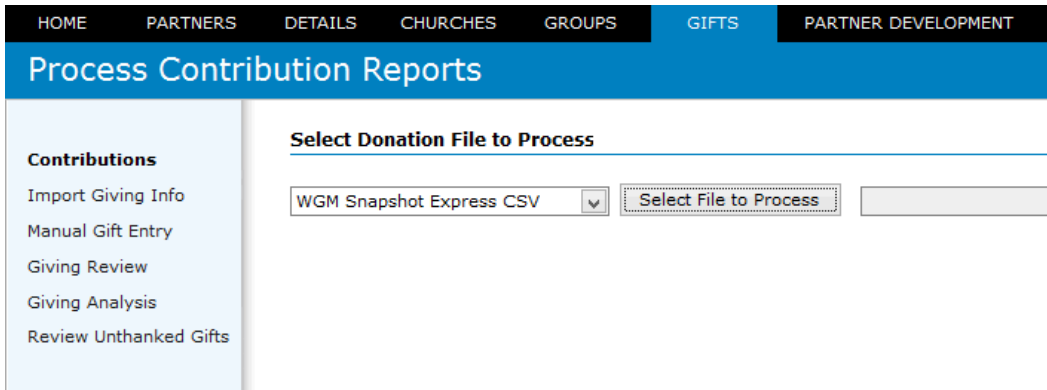
Note: If your organization provides you an electronic report of contributions, but the Donor Manager doesn't know how to handle that, contact us and we'll see if we can add support for your organization's data format in a future release of the Donor Manager program.

Automatic Posting of Contributions

If you have access to a contributions data file supported by the program, the Donor Manager will automatically post them to your donor master file and the giving history files.

Here is the process to follow:

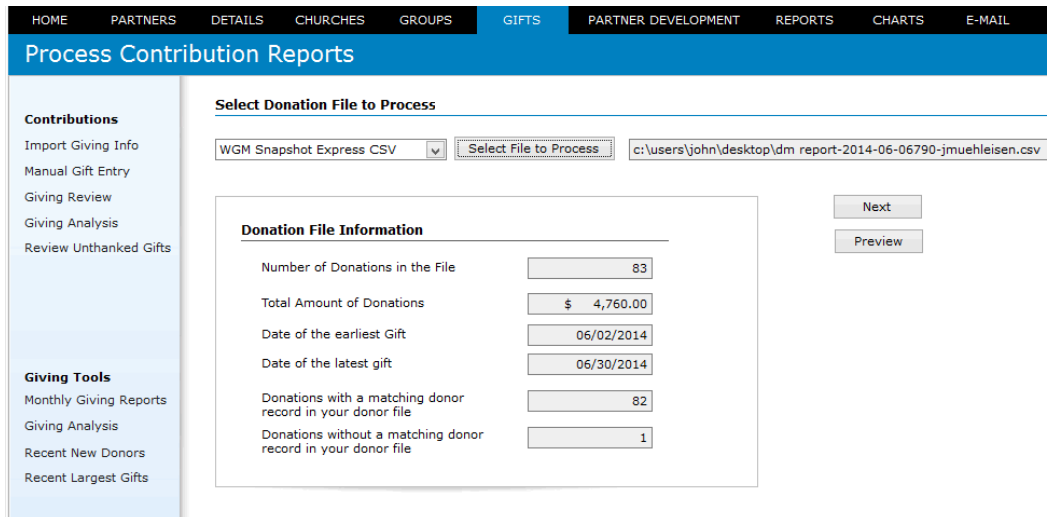
Once you have your donation data on your local hard disk, it is ready to be loaded into the Donor Manager program. To import these contributions into the donor manager, go to the "Gifts" screen.



The first step is to select the type of data file and to specify the name and location of the file containing the donation data. It could be an Excel (.xls) file, a dBase or FoxPro file (.dbf), a comma separated value delimited file (.csv), a .txt or .rtf text file, or some other type of file provided by your organization. Click on the button “Select File to Process” and navigate to the file with your giving information.

Note: if the file you are processing is an Excel file, it must be in the Excel 5.0 / Excel 95 format, not the more common Excel 97 / 2003 format.

The program will then import the data and check to see if it is in the correct format. The program will then check the donors against your partners master file and tell you how many donors it could find, and how many it could not find. You will be given a report of this initial analysis.



The program matches donors based on their Donor ID number. If it can't find a particular donor in your master file, it is because either the donor doesn't exist, or because the donor doesn't have a donor ID number assigned.

For some organizations (who do not put a Donor ID number on their contributions report file) the matching is done by Donor Name and Donor Zip / Post Code.

After reviewing the Donation File Information, click the “Next” button.

Matching Donations to Donors

If there are any donors that the program cannot identify, it will bring up a list of them and allow you to match them to names in your donor master file. If the donor doesn't exist in your master file, you can also tell the program to create a new master record for this donor.

The program will not let you move to the "posting" until you have either matched each unidentifiable gift with an existing donor, or created a new donor record.

The first time you do an automatic posting, it can take quite a while to match gifts with donor records. Subsequent postings go much more quickly as your donor master file "Donor ID" list becomes more complete.

Match Donations to their Partner Master Record

Donations without a matching Donor Record

Donor	Name	City	State
32145	Mr and Mrs Jess D. Roques	Jackson	MS

My Partner File Match by city Find

Last	Name	City	State
PATRICK JD	Mrs H H. Lee Estate <DECEA	Jackson	GA
TRINITY WE	Christ Independent Methodist	Jackson	MS
JAMES	Briary Union Church	Jackson	MS
MATLOCK	Parkwood United Methodist C	Jackson	MS
MIDDLEBROO	Rev and Mrs David L. Cowles	Jackson	GA
LEAVEL WOO	Dan and Deb Lindholm	Jackson	MS
BOYETTE GI	River Valley Christian Fellows	Jackson	MS

Posting Contributions

HOME PARTNERS DETAILS CHURCHES GROUPS GIFTS PARTNER DEVELOPMENT REPORTS CHARTS E-MAIL LISTS TOO

Process Contribution Reports

Contributions

- Import Giving Info
- Manual Gift Entry
- Giving Review
- Giving Analysis
- Review Unthanked Gifts

Giving Tools

- Monthly Giving Reports
- Giving Analysis
- Recent New Donors
- Recent Largest Gifts

Post Donations to the Donor Giving Records

Ready to Post

The donation wizard has enough information to process these donations. You are now ready to post these donations to the giving history in your donor master file.

However, there appears to be some giving info in your giving history file for this month already. How would you like to handle these new donations?

Add these donations to any current giving records

If any donations for this month are found, replace them with these donations

Fund and Motivation Codes

If you wish to attach a particular fund or motivation code to these contributions, you can do that here. This information can also be updated in the Gift Review or Partner Giving Details screens.

Fund / Designation

Motivation Code

Once each donation has been matched to a donor master record, the program will allow you to post the contributions to the giving history file.

If the program finds any existing giving information in the giving history file for the same months in your posting file, it will inform you. You have the choice of adding the new contributions to the existing contribution data, or replacing the

existing data with the new data. 95% of the time, you will want to replace any existing data with the new data.

To post the contributions, simply click the “Post to Giving History” button. It takes just a few seconds, and you are done!

Manual Contribution Entry

If you do not have a data file to use as the source for an automatic posting, you can record contributions manually. To do manual contribution entry, go to the “Gifts” screen and select the “Manual Gift Entry” option.

The screenshot shows a web application interface for recording contributions. At the top, there is a navigation bar with tabs: HOME, PARTNERS, DETAILS, CHURCHES, GROUPS, GIFTS (selected), PARTNER DEVELOPMENT, REPORTS, CHARTS, E-MAIL, LISTS, TOOLS, and QUIT. Below the navigation bar is a header for 'Record Contributions' with the user name 'John and Beth MueHeisen' on the right. On the left side, there is a sidebar menu with sections: 'Contributions' (Import Giving Info, Manual Gift Entry, Giving Review, Giving Analysis, Review Unthanked Gifts) and 'Giving Tools' (Monthly Giving Reports, Giving Analysis, Recent New Donors, Recent Largest Gifts). The main content area is titled 'Enter Contribution Information Manually' and contains a form with four steps:

- 1. Select a Month**: Gift Month (May), Year (2013), Gift Date (05/01/2013).
- 2. Select the Donor**: Donor ID or last name (empty field).
- 3. Update the Address**: Donor ID (empty), Name (Mrs C E. Abbott), Address (4165 Koepfgen Road), Address 2 (empty), City (Powder Spring), State (GA), Zip (30127), Country (USA), Phone (999-999-9999). There is also a 'Support' field (0) and a 'Comments' field (testing note / 3).
- 4. Enter the Gift**: Gift Amount (125.00), Fund / Designation (empty), Motivation Code (empty). Buttons include 'Record this Gift', 'Update Fund List', and 'Update Codes'. There is also an 'Edit Partner Information' button.

There are basically four steps to manually recording a contribution in the program. First of all, you need to select the month and the year of the contribution that you are entering. So if you have your printout from May 2014, you will set the date information at the top of the screen to read appropriately.

You will work through your printout, donation by donation. So, the next step is to find the donor’s record. If you know the donor’s ID number, which you usually do if you are working from a paper printout, simply enter that in the field titled “Donor ID.” Then, click on the “Search” button.

If you have not yet entered your donor IDs into the Donor Master record, you can search for a donor’s record alphabetically by typing in the first few letters of their last name. Then, click on the search button and the program will find the closest match to what you have typed in. If you type in “Smith,” the program will give you a list of all of the Smiths in your master contact list and you can choose the appropriate one from that list.

The next step is to double check the address for the donor. You need to look at the mailing address on the printout to see and compare it with the address that you have in your computer. If there are any changes in the address, simply click the “Update Donor Information” button and you can make whatever changes you would like. Likewise you can enter any additional information about support from this donor if they have pledged support since the last time you work on a record and any additional comments that may be useful to you. Any of the

information that you enter here will go back immediately into the donor master record.

The fourth step is to enter the amount of the donation. Simply enter in the amount of the gift that they sent you and click the button titled "record this gift". The amount of the donation will be recorded back in the donor master file and any changes or updates you've made in the donor's mailing address will likewise be posted back to their master record.

Repeat this process for each of the contributions on your printout.

5

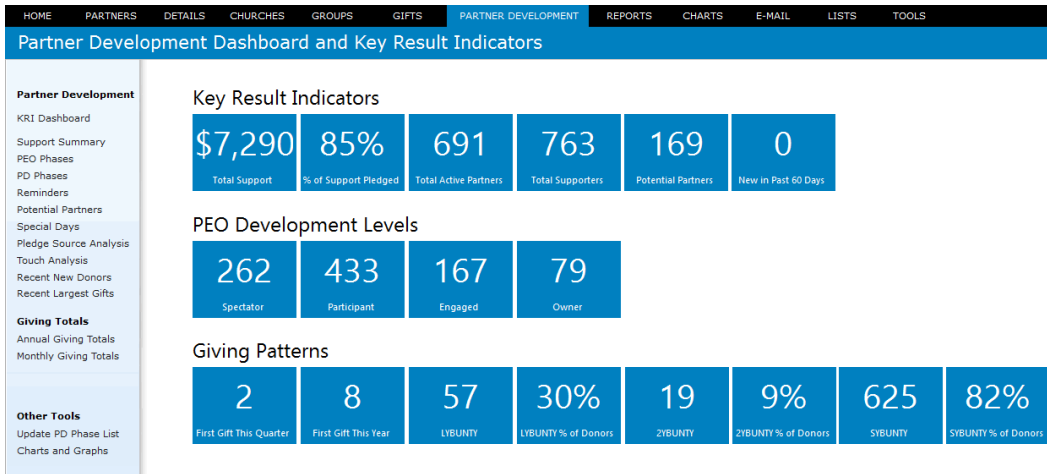
Partner Development:

Support Goals, Special Days, Reminders, PEO Status, PD Status Prospects, and Giving Totals

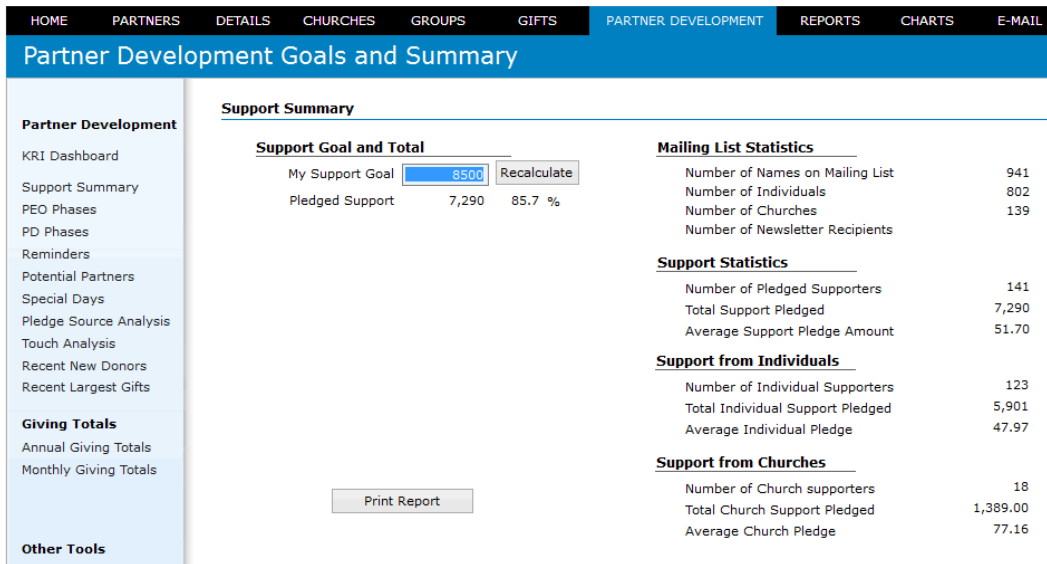
The Donor Manager provides a number of tools to help you with your support development efforts. Most of these options are on the screen titled “Support Development.” There is also direct access to some of the sub-sections of this part of the program from the main menu.

Support Goals

If you are involved in active support development, the program can help you track your progress towards full support as well as give you some useful analysis of your financial support base.



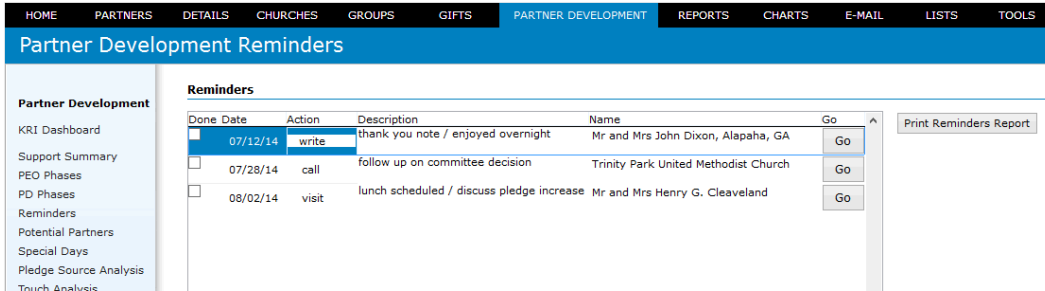
If you enter an amount for your support goal (and then click “Recalculate”), the program will do some analysis of your progress toward your goal. It will calculate the amount of pledged support that you have recorded in the donor master file and compare it with your goal.



In addition, the program presents some statistics about your mailing list and support statistics, with a breakdown by church and individual.

You can print this information on your printer if you would like a paper copy of this information.

Reminders



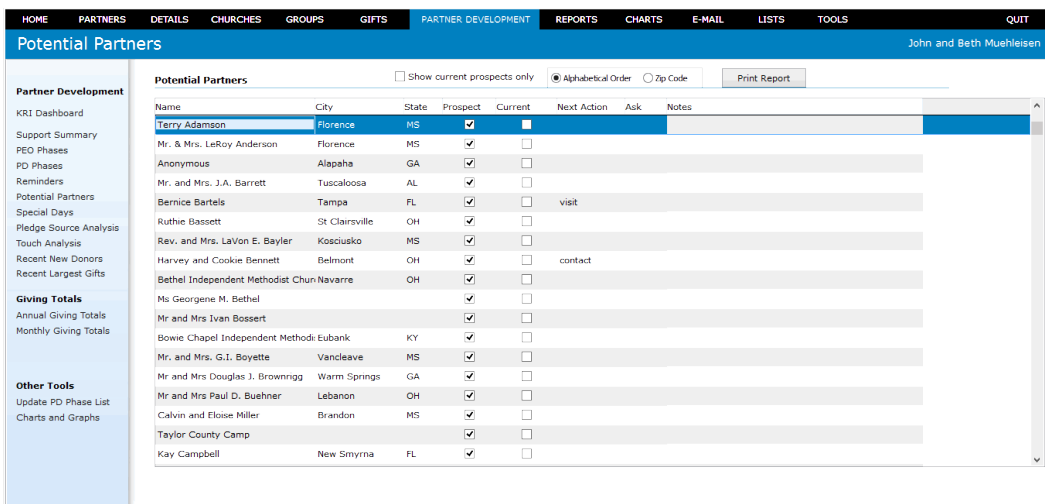
The reminders screen gives you a list of all of the follow-up events that you recorded on the “touches” screen for each donor.

When you record a touch in the donor master record, you have the option of putting additional follow-up information to each record of a touch. If you did put something in as a follow-up item, it will appear on this particular list. The list will give you the date and the action you intend to take as well as a description and the name and contact information about the donors that you were referring to.

Once you have completed this particular follow-up, simply click on the “Done” button. This will mean that this item will be considered closed and the action item will disappear from the reminders list.

This is especially useful when on Home Ministry Assignment.

Potential Partners



The Potential Partners screen allows you seek a listing of each contact that you have said is a prospect. It is often useful at the beginning of your home ministry assignment to go through your entire file and tag as a prospect all of the people that you want to be sure to make a personal contact with some time during your deputation. The program will allow you to track those potential partners until

you actually contact every one of them and record their decision as to whether or not they will support your ministry.

Many times you will have a large number of prospects, but you want to concentrate in the short term on a smaller group. For each of the prospects you can indicate that they are “current” prospects. Then, if you want, you can take a look at all of your prospects, or only your current prospects. This will enable you to keep track of who you are tracking, and who you’re making special efforts to reach this particular week.

When you are looking at the prospect screen, you can go directly to the full donor record of one particular donor’s simply by clicking on the button labeled “Go” on the same line as the name and address.

Special Days

Month	Day	Event	Description	Name	Go
3	6	Anniversary	Sam and Marilyn	Mr and Mrs Sam S Bean, Greenwood, IN	Go
3	12	Birthday	Tom's Birthday	Mr Thomas F Peterson, New Smyrna Be, FL	Go
3	12	Birthday	Will's Birthday	Will and Jean Barris, Uhrichsville, OH	Go
5	19	Birthday	Jean's Birthday	Will and Jean Barris, Uhrichsville, OH	Go
6	18	Anniversary		Mr Thomas F Peterson, New Smyrna Be, FL	Go
7	12	Birthday	Marilyn	Mr and Mrs Sam S Bean, Greenwood, IN	Go
7	27	Birthday	Arlene's Birthday	Mr Thomas F Peterson, New Smyrna Be, FL	Go
9	3	Anniversary	Will and Jean's Anniversary	Will and Jean Barris, Uhrichsville, OH	Go
11	25	Birthday	Sam	Mr and Mrs Sam S Bean, Greenwood, IN	Go
12	25	Christmas	Merry Christmas, Roland	A & R Machine Co Inc, East Sparta, OH	Go

The special days screen lists all of the special events that you have put in for all of your partners, but in one place.

It lists each special event in chronological order so that you can see all the events in each month.

You can get a printout of these events so that you can have it on paper if you find that useful. This is helpful for those who send special greetings or birthday cards to their ministry partners.

Giving Totals

The program can give you a quick overview of the contributions to your ministry over a period of time. You can view these totals by year, or month by month.

Annual Giving Totals

HOME PARTNERS DETAILS CHURCHES GROUPS GIFTS PARTNER DEVELOPMENT REPORTS

Partner Development Annual Giving Totals

Partner Development

- KRI Dashboard
- Support Summary
- PEO Phases
- PD Phases
- Reminders
- Potential Partners
- Special Days
- Pledge Source Analysis
- Touch Analysis
- Recent New Donors
- Recent Largest Gifts

Giving Totals

- Annual Giving Totals
- Monthly Giving Totals

Other Tools

- Update PD Phase List
- Charts and Graphs

Annual Giving Totals

Year	Total Giving	Individuals	Churches
2014	18,049	16,119	1,930
2013	95,437	84,794	10,643
2012	92,394	84,809	7,584
2011	100,463	94,043	6,420
2010	113,856	104,368	9,488
2009	84,650	79,810	4,840
2008	95,271	87,342	7,929
2007	102,949	95,929	7,020
2006	79,715	71,072	8,643
2005	85,379	78,247	7,132
2004	107,518	100,688	6,830
2003	45,590	43,170	2,420
2002	34,965	33,585	1,380
2001	64,205	62,735	1,470
2000	41,903	38,955	2,948

Print Report

Monthly Giving Totals

HOME PARTNERS DETAILS CHURCHES GROUPS GIFTS PARTNER DEVELOPMENT REPORTS CHARTS E-MAIL LISTS TOOLS

Partner Development Monthly Giving Totals

Partner Development

- KRI Dashboard
- Support Summary
- PEO Phases
- PD Phases
- Reminders
- Potential Partners
- Special Days
- Pledge Source Analysis
- Touch Analysis
- Recent New Donors
- Recent Largest Gifts
- Giving Totals**
- Annual Giving Totals
- Monthly Giving Totals
- Other Tools**
- Update PD Phase List
- Charts and Graphs

Month by Month Giving Analysis

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2014	5,629				7,660	4,760							18,049
2013	5,738	7,975	8,084	17,154	8,059	5,050	5,696	4,631	7,539	8,521	4,904	12,085	95,437
2012	5,248	4,880	6,587	12,059	9,494	5,935	7,176	5,708	5,445	6,626	5,757	17,475	92,394
2011	5,940	18,815	9,311	7,372	11,455	5,045	6,831	4,955	6,545	9,018		15,173	100,463
2010	6,120	6,870	5,233	14,171	8,413	5,988	8,443	7,034	9,515	8,677	13,021	21,518	115,006
2009	4,929	6,117	9,371	7,409	5,748	6,947	4,544	5,048	6,770	5,576	8,280	13,908	84,650
2008	6,887	17,612	11,755	11,140	5,714	5,918	6,361	9,695	4,770	6,015		9,402	95,271
2007	5,135	4,825	5,715	9,245	4,619	4,441		13,685	5,699	18,730	6,560	24,293	102,949
2006	4,320	5,875	7,665	7,470	5,355	4,249	4,680	3,194	4,765	5,115	5,955	21,072	79,715
2005	9,878	6,136	4,550	9,867	4,251	8,084	6,226	4,434	4,874	5,468	6,955	14,656	85,379
2004	2,251	5,405	11,149	13,940	9,265	5,591	6,556	6,728	7,515	7,892	11,241	19,985	107,518
2003	2,081	2,435	3,126	3,685	2,885	2,786	4,345	2,428	4,926	4,476	2,905	9,512	45,590
2002	1,437	2,265	2,590	3,951	1,860	2,472	1,375	5,238	2,068	1,945	3,561	6,327	35,090
2001	26,038	1,950	5,411	3,700	2,880	2,705	3,990	2,817	2,645	3,175	2,690	6,322	64,323
2000	3,183	3,158	5,513	2,898	2,985	3,538	2,983	3,465	3,668	2,993	2,952	4,647	41,983
1999	3,590	5,719	5,658	4,836	3,596	4,484	3,949	4,245	6,330	3,090	3,864	6,949	56,310
1998	3,909	8,735	5,619	16,093	6,730	8,390	4,529	10,560	5,543	14,544	3,260	7,734	95,646
1997	3,452	3,543	4,258	3,040	3,991	3,833	2,681	3,517	5,498	2,864	4,704	10,612	51,993
1996	4,042	3,360	4,219	3,299	3,022	3,386	2,779	3,350	3,098	3,571	3,189	5,110	42,425

Print Report

6

Reports

The program has a number of pre-defined reports available for your use. The reports are divided into various categories and have a number of sorting and filtering options:

The screenshot displays the 'Print Reports, Labels and Envelopes' interface. The top navigation bar includes: HOME, PARTNERS, DETAILS, CHURCHES, GROUPS, GIFTS, PARTNER DEVELOPMENT, **REPORTS**, CHARTS, E-MAIL, LISTS, TOOLS, and QUIT. The user name 'John and Beth Muehleisen' is visible in the top right corner.

The main content area is titled 'Partner Reports' and lists several report options:

- Quick Reference List - Alphabetical**: One line per partner in alphabetical order.
- Quick Reference List - Geographical**: One line per partner in zip code order.
- Alphabetical Partner Listing**: Multiple lines per partner, includes comments, alphabetical order.
- 3 Column Alphabetical Partner Listing**: 3 columns per page, condensed partner information.
- Geographical Partner Listing**: Multiple lines per partner, includes comments, zip code order.
- Partner List by Type**: Partner names and addresses, sorted by type, then by zip.
- Partner Giving History - Alphabetical Order**: Partner information with detailed giving history.
- Partner Giving History - Zip Code Order**: Partner information with detailed giving history.
- Supporters List**: Reference List of Supporters and Support Amounts.
- Upcoming Support Expirations**: List of supporters whose support pledge is ending soon.

On the right side, there are filtering options:

- Basic Filter:** Advanced Filter
- Include these Donor Types:**
 - All Donor Types
 - Only One Donor Type: [dropdown]
- Include partners in these groups:**
 - Use All Groups
 - Is in any of these groups
 - Is in all of these groups
- Select Group:** A list of groups including: Former Supporter, Hotlist, Indian Springs, Life Share, Need Info, Need New Email Address, Need to Cultivate, Our Family, and Pastor.
- Other filters:**
 - All Giving Patterns [dropdown]
 - All Partner Phases [dropdown]
 - Is a Donor
 - Is a Church
 - Is a Prospect
 - OK to Solicit
 - OK to E-Mail
 - Send Newsletter
 - Pledged Support
 - Does Not Have An E-Mail Address
 - Show Deceased Partners
 - Hide Inactive Partners

First of all, let's take a look at the pre-defined reports that the donor manager program makes available for you:

Partner Reports

Quick Reference List

This report prints one line per partner, in alphabetical order or in zip code order, to give you a quick and concise listing of the names. It lists the partner's name and address, their telephone number and e-mail address (if available) as well as some information about any support this partner may have pledged toward your ministry.

John and Beth Muehleisen

25 July 14 12:42 pm

Donor Quick List

Filtered: OK to send E-Mail, Send Newsletter, Hide deceased partners

Page 2

Sort	Name	Address	Phone	E-Mail	Support	Donor
	Applebee, Miss Grace	St Clairsville OH 43950-8412	999-999-9999	email@email.com		27355
	Arbmann, Mr. and Mrs. Charles	Laurel MS 39443	999-999-9999	email@email.com		173
	Asbury Congregational Methodist Church	817 Island Point Drive Tuscaloosa AL 35401-2146	999-999-9999	email@email.com		970321
	Auxiliary, Georgia Prayer	Ashville OH 43103-9427	999-999-9999	email@email.com	17	34946
	Ayres, Miss Irene	501 King St Apt 114 Alma GA 31510	999-999-9999	email@email.com		14488

B

	Backlund, Mrs Florence M.	P.O. Box 253 New Wilmington PA 16142	999-999-9999	email@email.com		
	Baines, Mr and Mrs Richard	P.O. Box 93 Edgewater FL 32132-2009	999-999-9999	email@email.com	17	221470
	Banter, Dr and Mrs Ken	PO Box 948 Pleasantville PA 16341-2213	999-999-9999	email@email.com		901123
	Barker, Mr and Mrs Les	PO Box 10 Oneonta AL 35121-7444	999-999-9999	email@email.com	20	220339
	Barnes, Mr and Mrs R B.	4606 W Earl Dr Crystal Springs MS 39059	999-999-9999	email@email.com		
	Barnett, Denise	32 Coventry Court Wellington TX 79095	999-999-9999	email@email.com		
	Barrager, Mr and Mrs Cliff T.	P.O. Box 961 Emlenton PA 16373	999-999-9999	email@email.com		
	Barrett, Mr. and Mrs. J.A.	Tuscaloosa AL 35405-2237	999-999-9999	email@email.com		17866
	Bartels, Bernice	3003 Greenbriar Rd Tampa FL 33626-3134	999-999-9999	email@email.com	175	115187
	Barbomeo, Mr and Mrs Marco	4933 Hwy 42 S Auburn AL 36830-7693	999-999-9999	email@email.com		
	Bassett, Ruthie	450 Columbus Circle St Clairsville OH 43950	999-999-9999	email@email.com		222557
	Bayler, Rev. and Mrs. LaVon E.	260 W Vinton St Kosciusko MS 39090-6720	999-999-9999	email@email.com	100	98351
	Beall, Mr and Mrs F Dan	P.O. Box 727 Knox PA 16232-1953	999-999-9999	email@email.com	33	221685
	Bean, Mr and Mrs Sam S	P.O. Box 370 Kosciusko MS 39090-4834	999-999-9999	email@email.com		210860

Alphabetical / Geographical Partner Listing

This report prints a good bit more information about each donor. You have your choice of printing this report in either alphabetical order or geographical order (sorted by ZIP code). This includes more information about the donor and some of the comments that you may have recorded in the donor master file.

John and Beth Muehleisen

25 July 14 12:43 pm

Donor Reference List

Page 3

Filtered: OK to send E-Mail, Send Newsletter, Hide deceased partners

Name	Support	Type	Church	Donor
Mr and Mrs R B. Barnes 4606 W Earll Dr Crystal Springs MS 39059 Lists: WGM Staff	999-999-9999 email@email.com	WG	Trinity Wesleyan Church,	WES
Denise Barnett 32 Coventry Court Wellington TX 79095	999-999-9999 email@email.com	FR	Wellington UMC	UMC
Mr and Mrs Cliff T. Barrager P.O. Box 961 Emlenton PA 16373 giving for this year (2010) through Bethany Crossroads EC	999-999-9999 email@email.com			
Mr. and Mrs. J.A. Barrett Tuscaloosa AL 35405-2237 Lists: Hotlist, Former Supporter	999-999-9999 email@email.com	FO		17866 UMC
Bernice Bartels 3003 Greenbriar Rd Tampa FL 33626-3134 Lists: Pastor, Hotlist, Christmas Card former First Pres NSB, Bible Study leader / moved to Tampa in 2002	999-999-9999 email@email.com	175 SU	First Presbyterian Church, New	115187 PRES
Mr and Mrs Marco Bartolomeo 4933 Hwy 42 S Auburn AL 36830-7693 Lists: Hotlist, Need Info we stayed with the Robinsons at the miss conference in spring 2003 / McEachern UMC / very interested	999-999-9999 email@email.com		McEachern Memorial United	UMC
Ruthie Bassett 450 Columbus Circle St Clairsville OH 43950 Lists: Pastor, Hotlist	999-999-9999 email@email.com		Thoburn United Methodist	222557 UMC
Rev. and Mrs. LaVon E. Bayler 260 W Vinton St Kosciusko MS 39090-6720 Lists: Hotlist, Our Family, Christmas Card Mike and Martha are Beth's sister and brother in law. Their daughter is Sarah.	999-999-9999 email@email.com	100 SU		98351 SALV

Donor List by Type

This report gives you a listing of the donors' names and addresses sorted by the donor types. For example, all of your regular supporters will be listed together, those who have taken a Life Investment, those who have made cash contributions, etc. These categories are defined by you so the listing will appear however you have defined the donor categories.

John and Beth Muehleisen

25 July 14 12:45 pm

Donor Reference List by Type of Donor

Page 19

Filtered: OK to send E-Mail, Send Newsletter, Hide deceased partners

Type	Name	Donor	Support	Type	Church
Life Investment (LI)					
	Mr. and Mrs. Frank Jenkins 600 N Colfax St Apt 135 Brookhaven MS 39601-4749	999-999-9999	20789	LI	
	Steve and Donna Henry 5102 Old Mobile Hwy Louisville KY 40218-1634	999-999-9999	21762	25 LI	
	Mr Brice Richardson 212 Avery Ct Wilmore KY 40390	999-999-9999		LI	
	Mr and Mrs Richard L. Schmucker 4052 Chambers Rd Newark OH 43055-1530	999-999-9999	113779	LI	
	Pine Grove Independent Methodist Church 1405 W 12th St Lancaster OH 43130-9502	999-999-9999	903955	LI	Faith Memorial Church, CCOU
	Drs. Dan and Erika Claud 51 County Road 430 St. Clairsville OH 43950-1129	999-999-9999	105107	LI	
	Mr and Mrs Paul D. Buehner 3 N Melrose Dr Lebanon OH 45036	999-999-9999	20454	LI	Thoburn UMC UMC
	Riverside Womens Missionary Society 8180 E 100 S Mishawaka IN 46544	999-999-9999		LI	
	Mr and Mrs Kenneth J. Flading Jr 4870 Maple Grove Rd SE Chicago IL 60611-4327	999-999-9999	946655	LI	Willow Creek IND
	Mr and Mrs W G. Elliott 3201 Larry Noland Road Glendale AZ 85302-7302	999-999-9999		LI	
Supporting Chur (SC)					
	Diane Dismuke 1315 Victory Palm Dr Powder Springs GA 30127-1504	999-999-9999	902090	250 SC	Asbury Congregational UMC
	Hulletts Chapel Independent Methodist Church 1444 US Hwy 80 W New Smyrna Beach FL 32168-7340	999-999-9999	914626	417 SC	First Presbyterian Church, New

Donor Giving History

This report lists each of your donors and then gives you the year by year and month by month breakdown of the giving history. Every contribution they have made to your ministry that has been entered into the computer is listed here. This is essentially the same information that is on the giving history tab of the detailed donor information screen.

John and Beth Muehleisen 25 July 14 12:46 pm
Donor Giving History Page 4
 Alphabetical Order

Filtered: OK to send E-Mail, Send Newsletter, Hide deceased partners

John Agnew, North Canton, OH # 112878 -

6313 Township Road 21, North Canton, OH 44720-2167 E-Mail: email@email.com Ph: 999-999-9999
 Lists: Christmas Card

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1998						200							200
													200

Revs Raymond & Catherine Ake, Ebensburg, PA # 988558 -

<deceased>, Ebensburg, PA 15931-4919 E-Mail: email@email.com Ph: 999-999-9999
 Lists: Christmas Card

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1999		20	10	10	10								50
1998							20	10	10	10	10	10	70
													120

Mrs Emmagene Akers, Milton, FL # 15614

Regular Support **120 Annual**

26272 Highway 19 N, Milton, FL 32570-8856 E-Mail: email@email.com Ph: 999-999-9999
 Christ United Methodist Church, Milton, FL Lists: Christmas Card
 Job Info: insurance
 Notes: interested in taking a share / Banke

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2014						25							25
2013		50		50		50		50		50		50	300
2012		50		50		50		50		50		50	300
2011		50		50		50		50		50		50	300
2010		50		50			50		50			50	250
2009	50									50			100
2008		50	50		50		50		50				250
													1,525

Supporters List

The Supporters List gives you a simple listing of all pledged supporters. It groups the individuals together, then the churches / groups, and lists the name and address, the amount of the pledge, and the frequency (if not monthly).

John and Beth Muehleisen

25 July 14 12:46

List of Financial Supporters

Page 1

Filtered: OK to send E-Mail, Send Newsletter, Hide deceased partners

Individual Supporters

Rev. Donna Goff / C/O McEachern Memorial UMC	27748	Akron, OH	20.00	
Rev. and Mrs. Bob Flint	983936	Houston, TX	17.00	200 Annual
Victory Congregational Methodist Church	115119	West Chester, PA	25.00	
Mrs. Mary Todd	68810	Cartersville, GA	20.00	
Jonathan and Lisa Mayo	211446	Fort Valley, GA	10.00	120 Annual
Mr and Mrs Robert B. Ranck	40994	Aurora, IL	25.00	
Mr. & Mrs. Tim Yelverton	45145	Grand Ronde, OR	25.00	
Miss Nora Lee Dickson	221891	Knox, PA	50.00	
Mrs. Peggy Miller	85276	Greenwood, IN	25.00	
Mr and Mrs Larry M. Kryske	128411	Franklin, IN	20.00	
St. Luke's United Methodist Church	982492	Clinton, MS	50.00	
Williamsville Independent Methodist Church	54857	Pharr, TX	25.00	
Mrs. C.J. Bishop	29880	,	20.00	240 Annual
Mr and Mrs Louis D Spaw Jr	991228	Hillsboro, OR	83.00	1,000 Annual
Mr and Mrs Bruce L. Vickey	103449	APO, AE	110.00	
Dr. and Mrs. William Chegwin	117405	New Smyrna, FL	17.00	50 Quarter
Linda Sue Gilmore	110827	Wilmore, KY	25.00	
Quanah United Methodist Church	4503	New York, NY	40.00	

Upcoming Support Expirations

This report give you a list of pledges that are expiring soon. When you select this report, the program will ask you to specify the number of months that you want to look ahead, and then lists pledges that expire during these upcoming months.

John and Beth Muehleisen		25 July 14 12:47 pm	
Pledges Expiring in the next 4 months			
Name	Support	Type Church	Donor
Bemice Bartels 3003 Greenbriar Rd Tampa FL 33626-3134 Lists: Pastor, Hotlist, Christmas Card This pledge ends on 01 March 92 former First Pres NSB, Bible Study leader / moved to Tampa in 2002	999-999-9999 email@email.com	175 SU FirstPresbyterian Church, New	115187 PRES
Rev. and Mrs. LaVon E. Bayler 260 W Vinton St Kosciusko MS 39090-6720 Lists: Hotlist, Our Family, Christmas Card This pledge ends on 01 September 91 Mike and Martha are Beth's sister and brother in law. Their daughter is Sarah.	999-999-9999 email@email.com	100 SU	98351 SALV

Donor Giving Analysis Reports

Donor Giving Analysis

The Donor Giving Analysis report gives you a list of your donors, one line per person, and does some analysis of their giving habits. It will tell you when their first gift was, the date and amount of their largest single gift, the date of their latest gift, the number of months since their latest gift, their total giving, the number of gifts they have given, and the size of their average gift.

John and Beth Muehleisen

Donor Giving Analysis Summary Filtered: OK to send E-Mail, Send Newsletter, Hide deceased partners

Donor Name & City	Latest Gift	Yr - Mo since gift	First Gift	Largest Single Gift			Total Giving	Average Gift	Support Amount	Type
			Date	Amount	# Gifts					
Mr and Mrs Edward H Barrett (deceased), Lawrenceville, IL	Feb 08	6-5	Feb 08	Feb 08	25	1	25	25	-	
Dr Joseph P Luce <Deceased>, Blairsville, Georgia	Apr 13	1-3	Apr 13	Apr 13	500	1	500	500	-	
Mr and Mrs Curtis D Lake <Deceased>, Richmond, OH	Feb 10	4-5	Feb 10	Feb 10	50	1	50	50	-	
Mrs Vera P. Wonn <Deceased>, Granite City, IL	Dec 10	3-7	Feb 98	Feb 98	250	4	700	175	Special Gifts	
Drs Charles C and Lois Ryan <deceased>, Opdyke, IL	Feb 08	6-5	Feb 08	Feb 08	200	1	200	200	-	
Jane K Wallace <deceased>, Cranberry, PA									-	
Mr. Sylvanus Miller <deceased>, New Smyrna Beach, FL									-	
Miss Frances E. Abbott, Kennesaw, GA									-	
Mrs C E. Abbott, Powder Springs, GA									Month	
Mrs Dearl W. Abbott, <deceased>, St Clairsville, OH	Jul 03	11-1	Jul 03	Jul 03	10	1	10	10	Special Gifts	
Trinity Chapel Academy, Fort Myers, FL									WGM Staff	
Terry Adanson, Florence, MS	Jun 14	0-1	Aug 97	Dec 12	2,000	194	61,350	316	6,000 Annual Regular Support	
Mr and Mrs Estel Adkins Jr, Lexington, KY	Jun 14	0-2	Jun 93	Feb 96	150	185	6,880	37	15 Month Regular Support	
Mr and Mrs Doug Adkins, Powder Springs, GA	May 14	0-3	May 14	May 14	150	1	150	150	30 Month -	
John Agnew, North Canton, OH	Dec 05	8-7	Dec 05	Dec 05	35	1	35	35	-	

LYBUNTY – Last Year, but Unfortunately Not This Year

The LYBUNTY report gives you list of partners who have made contributions to your ministry last year (between 12 and 24 months ago), but who have not contributed to your ministry this year.

John and Beth Muehleisen

LYBUNTY - Last Year, but Unfortunately Not This Year

Filtered: OK to send E-Mail, Send Newsletter, Hide deceased partners

Donor Name & City	Latest Gift	Yr - Mo since gift	First Gift	Largest Single Gift Date	Amount	# Gifts	Total Giving	Average Gift	Support Amount	Type
Dr Joseph P Luce <Deceased>, Blainsville, Georgia	Apr 13	1-3	Apr 13	Apr 13	500	1	500	500	-	-
Mr Donald Altman, Mabie, WV	Sep 12	1-11	Aug 04	Oct 07	3,000	9	7,962	884	500 Annual	Church Non Supp
Georgia Prayer Auxiliary, Ashville, OH	Oct 12	1-10	Oct 92	Nov 04	300	29	3,670	126	200 Annual	Special Gifts
Mr and Mrs Richard Baines, Edgewater, FL	Dec 12	1-7	Aug 10	Mar 11	50	5	145	29	50 Quarter	-
Dr and Mrs Ken Banter, Pleasantville, PA	May 13	1-3	May 13	May 13	100	1	100	100	-	-
Mr and Mrs Les Barker, Oneonta, AL	Apr 13	1-3	Jul 10	Jul 12	984	5	2,493	498	20 Month	-
Bernice Bartels, Tampa, FL	Jul 13	1-0	Feb 92	Mar 10	175	255	18,980	74	175 Month	Regular Support
Ron and Thelma Benson, Knox, PA	Apr 13	1-3	Dec 10	Dec 10	2,000	5	3,050	610	-	-
Bethel Independent Methodist Church, Navarre, OH	Dec 12	1-7	Apr 98	Apr 98	1,712	16	3,482	217	120 Annual	Church Non Supp
Mr and Mrs Larry D. Brown, Brandon, MS	Mar 13	1-4	Mar 13	Mar 13	25	1	25	25	-	-
Christian Fellowship Independent Methodist Ch, Wilmore, KY	Jan 13	1-6	Nov 97	Apr 04	111	5	306	61	-	Church Non Supp
Alapaha United Methodist Church, Avon Park, FL	Mar 13	1-4	Feb 08	Feb 08	100	2	120	60	-	-
First United Methodist Church, Barnesville, OH	Jun 13	1-1	Mar 08	Aug 08	200	7	800	114	-	-
Killen United Methodist Church, Parkersburg, WV	Dec 12	1-8	Jul 92	Dec 09	5,000	22	16,300	740	2,000 Annual	Regular Support
Moundsville United Methodist Church, Knottston, MS	May 13	1-3	Jun 08	May 13	200	47	1,800	38	-	Former Support

SYBUNTY – Some Year, but Unfortunately Not This Year

The SYBUNTY report is similar to the LYBUNTY report (listed above), except it lists partners who have given at some time in the past, but who have not given in the past 12 months.

John and Beth Muehleisen

SYBUNTY - Some Year, but Unfortunately Not This Year

Filtered: OK to send E-Mail, Send Newsletter, Hide deceased partners

Donor Name & City	Latest Gift	Yr - Mo since gift	First Gift	Largest Single Gift Date	Amount	# Gifts	Total Giving	Average Gift	Support Amount	Type
Mr and Mrs Edward H Barrett (deceased), Lawrenceville, IL	Feb 08	6-5	Feb 08	Feb 08	25	1	25	25	-	-
Dr Joseph P Luce <Deceased>, Blainsville, Georgia	Apr 13	1-3	Apr 13	Apr 13	500	1	500	500	-	-
Mr and Mrs Curtis D Lake <Deceased>, Richmond, OH	Feb 10	4-5	Feb 10	Feb 10	50	1	50	50	-	-
Mrs Vera P. Wonn <Deceased>, Granite City, IL	Dec 10	3-7	Feb 98	Feb 98	250	4	700	175	-	Special Gifts
Drs Charles C and Lois Ryan <deceased>, Opydke, IL	Feb 08	6-5	Feb 08	Feb 08	200	1	200	200	-	-
Mrs Pearl W. Abbott, <deceased>, St Clairsville, OH	Jul 03	11-1	Jul 03	Jul 03	10	1	10	10	-	Special Gifts
John Agnew, North Canton, OH	Dec 05	8-7	Dec 05	Dec 05	35	1	35	35	-	-
Revs Raymond & Catherine Ake, Ebensburg, PA	Feb 08	6-5	Feb 08	Feb 08	12	1	12	12	-	-
Mr and Mrs Robert Allen, Marion, IN	Mar 07	7-4	Jan 05	Jan 05	20	26	520	20	Month	Regular Support
Robert and Charlotte Alman, Clinton, MS	Jul 04	10-1	Jul 04	Jul 04	25	1	25	25	40 Month	Special Gifts
Mr Donald Altman, Mabie, WV	Sep 12	1-11	Aug 04	Oct 07	3,000	9	7,962	884	500 Annual	Church Non Supp
Anonymous, Alapaha, GA	Mar 08	6-4	Oct 98	Oct 98	800	3	1,200	400	-	Former Support
Miss Grace Applebee, St Clairsville, OH	Aug 97	16-12	Oct 91	Dec 95	240	18	1,120	62	-	Former Support
Mr. and Mrs. Charles Artmann, Laurel, MS	Mar 99	15-5	Apr 92	Jun 92	60	68	1,185	17	-	WGM Staff
Aebury Congregational Methodist Church, Tuscaloosa, AL	Mar 11	3-4	Mar 11	Mar 11	1,000	1	1,000	1,000	-	-
Georgia Prayer Auxiliary, Ashville, OH	Oct 12	1-10	Oct 92	Nov 04	300	29	3,670	126	200 Annual	Special Gifts
Miss Vera Wonn, Granite City, IL	Dec 10	3-7	Feb 98	Feb 98	250	4	700	175	-	Special Gifts

Trailing 12 Month Giving Analysis

This report lists your ministry partners and analyzes their giving patterns for the previous 12 months. It lists names and addresses, pledge information (if any) and the month by month giving for the previous year.

12 Month Giving Analysis for August 2013 through July 2014

Filtered: OK to send E-Mail, Send Newsletter, Hide deceased partners

Name	Qty	Sup	Frequency	Aug 13	Sep 13	Oct 13	Nov 13	Dec 13	Jan 14	Feb 14	Mar 14	Apr 14	May 14	Jun 14	Jul 14	Total
First United Methodist Church	Alapaha, GA															
Mr and Mrs Alvin P Scheerer	Lisbon, OH															
Mr. and Mrs. Frank Jenkins	Brookhaven, MS		Annual													
Dr and Mrs David Case	Greensboro, NC			20	20	20	20	40	20					20		160
Mrs Shirley Krebs	North Canton, OH															
Mr. and Mrs. Donald Miller	Florence, AL															
Mrs. Connie Schramm	Pascagoula, MS															
Mrs Dorothy L. Tilly	Florence, MS			20	20	20	20	20	20				20	20		160
Andy and Lizet Bowen	Brandon, MS		50 Month	25	25	25	25	25	25				25	25		200
Tom and Jane Russell	Pearl, MS		25 Month													
Mrs C E. Abbott	Powder Springs, GA		Month		40		40		40				40			160
Mr and Mrs Robert Horsey	Kissimmee, FL															
First United Methodist Church	Barnesville, OH															
Mr D Nicholas Strong	Goshen, IN															
Camden UMW	Kosciusko, MS		Annual													

Late Supporters with Trailing 12 Month Giving Analysis

This report lists your pledged ministry partners who have not made a contribution in the previous x number of months. You can specify how many months to look at to define a “late” supporter. Note: set the number of months for a “late” supporter on the “Personalize this program” screen on the Tools menu.

Largest Donors in a Year

This report will allow you to select a year, and then will list, in descending order, the largest donors to your ministry in that year. The report separates the individual donors from the church donors and gives a separate list for each.

John and Beth Muehleisen

25 July 14

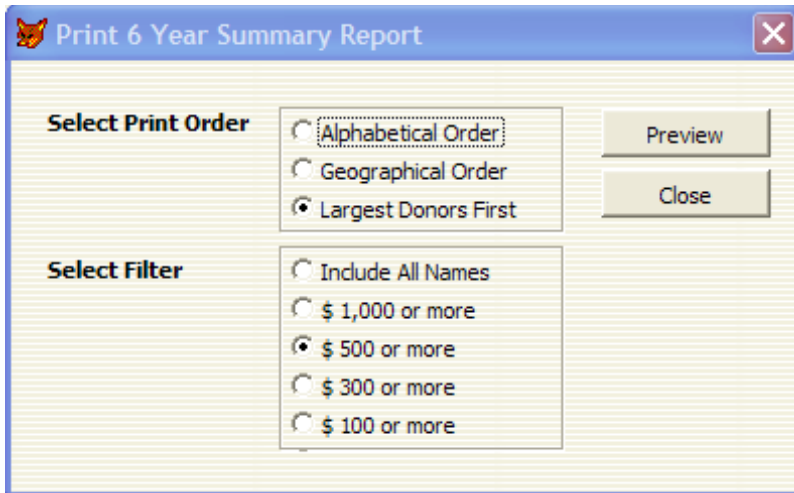
Donor Total Giving for 2013

Page 1

Total	Name	Support	Church
Individuals			
5,000	First Presbyterian Church	Babson Park, FL	
4,900	Mary E. Miller	Greenwood, MI	
4,862	First Independent Methodist Church	Oregon City, OR	ECNA
4,500	Ms Sarah L. Luce	,	
4,150	McEachern Memorial United Methodist	Avon Park, FL	
2,753	Hanfield United Methodist Church	Avon Park, FL	
2,566	Bethany Crossroads EC Church	Waynesburg, OH	
2,347	Thoburn United Methodist Church	Grimstead, VA	
1,750	Hollow Rock Camp	Marion, IN	
1,430	Mr and Mrs Brent R. Bohne	Lake Alfred, FL	
1,400	Dr and Mrs Charles K Sims	West Chester, OH	Cornerstone UMC
1,382	Trinity Park United Methodist Church	Clanton, AL	
1,300	Mr and Mrs Jess Roques	Hanover, PA	
1,300	Myrtle Grove United Methodist Church	Cass City, MI	
1,200	John and Beth Muehleisen	Fort Valley, GA	
1,200	Mr. Thomas F Peterson	Garrett, IN	

Six Year Giving Summary Report

This report list summarizes the giving for the past six years for your ministry partners. You can specify the order you would like the report printed in, and optionally, you can only include your largest supporters.



The image shows a software dialog box titled "Print 6 Year Summary Report". It features a blue title bar with a small orange cat icon on the left and a red close button on the right. The main area has a light beige background with a fine grid pattern. On the left, there are two sections: "Select Print Order" and "Select Filter". Each section contains a list of radio button options. To the right of these sections are two buttons: "Preview" and "Close".

Select Print Order

- Alphabetical Order
- Geographical Order
- Largest Donors First

Select Filter

- Include All Names
- \$ 1,000 or more
- \$ 500 or more
- \$ 300 or more
- \$ 100 or more

Buttons: Preview, Close

Regional Support Analysis

This report summarizes your support base by region, and within each region, by state. Note: Region and state information is set on the "Tools / Codes" screen of the program.

John and Beth Muehleisen

Regional Support Analysis

25 July 14
Page 1

Region	Contacts	Churches	Individuals	Supporters	Support	%
	89	6	83	4	70	0.9 %
AE	1		1	1	110	1.5 %
BC	1		1			
Delaware	1		1			
Georgia	1		1			
	93	6	87	5	180	2.4 %

Central Region

Illinois	16	1	15	3	117	1.6 %
Indiana	77	9	68	16	598	8.2 %
Kansas	1		1			
Kentucky	30	4	26	6	465	6.3 %
Michigan	25		25	2	54	0.7 %
Minnesota	3		3	1	85	1.1 %
Missouri	10		10			
Nebraska	2		2			
Ohio	115	9	106	16	777	10.6 %
South Dakota	1		1	1	30	0.4 %
Texas	25	8	17	3	67	0.9 %
	305	31	274	48	2,193	30.0 %

Northeast Region

Maryland	3	2	1			
New Jersey	4	1	3			
New York	1		1	1	40	0.5 %
Pennsylvania	37	2	35	7	203	2.7 %
Virginia	9	1	8	2	40	0.5 %
West Virginia	11		11	5	315	4.3 %
	65	6	59	15	598	8.2 %

Other Reports

HOME PARTNERS DETAILS CHURCHES GROUPS GIFTS PARTNER DEVELOPMENT **REPORTS** CHARTS

Print Reports, Labels and Envelopes

Reports
Partner Reports
Geographical Reports
Giving Analysis
Other Reports
Monthly Giving Reports
Giving Statements

Labels & Envelopes
Mailing Labels
Envelopes

Export
Export & Merge

Other Reports

Special Events Listing
List of the special dates for each partner, sorted by date

Churches and Associated People
Prints Churches and the names of those linked to the Church

Follow Up Reminders
Print dates, comments, and names for follow up actions

E-Mail Addresses
List all of the e-mail addresses for your partners

Date of Last Touch / Contact
List partners and the date of the last contact / touch with them

List of Gifts Not Yet Thanked
Partners and gifts that have not been marked as "thanked"

List Contributions by Fund ID
View the details or a summary of gifts t

Special Events Listing

This report gives you a list, sorted chronologically, of each of the special events for each donor. This is useful for when sending birthday cards, anniversary cards, etc. This is the same report that prints when you click “print report” from the special events screen.

John and Beth Muehleisen

Event Listing

25 July 14 12:58 pm

Page 1

Month	Event	Description	Name	
<u>March</u>				
6	Anniversary	Sam and Marilyn	Mr and Mrs Sam S Bean P.O. Box 370 Kosciusko, MS 39090-4834	email@email.com 999-999-9999
12	Birthday	Tom's Birthday	Mr. Thomas F Peterson 946 Stone Ridge Ln Garrett, IN 46738-9654	email@email.com 999-999-9999
12	Birthday	Will's Birthday	Will and Jean Barris 1800 Lay Dam Rd Uhrichsville, OH 44683-1378	email@email.com 999-999-9999
<u>May</u>				
19	Birthday	Jean's Birthday	Will and Jean Barris 1800 Lay Dam Rd Uhrichsville, OH 44683-1378	email@email.com 999-999-9999
<u>June</u>				
18	Anniversary		Mr. Thomas F Peterson 946 Stone Ridge Ln Garrett, IN 46738-9654	email@email.com 999-999-9999
<u>July</u>				
12	Birthday	Marilyn	Mr and Mrs Sam S Bean P.O. Box 370 Kosciusko, MS 39090-4834	email@email.com 999-999-9999
27	Birthday	Arlene's Birthday	Mr. Thomas F Peterson 946 Stone Ridge Ln Garrett, IN 46738-9654	email@email.com 999-999-9999

Churches and Associated People

This report gives you a listing of each of your churches and the people that are in each of those churches. This helps you see the membership of the churches that you have in your mailing list and to keep track of who is connected with which church.

John and Beth Muehleisen 25 July 14 12:59 pm
Church Information Page 1

Asbury Congregational Methodist Church	999-999-9999	
817 Island Point Drive, Tuscaloosa, AL 35401-2146	email@email.com	
Mrs Marie Darrenkamp <deceased>	P.O. Box 599, Knox, PA, 16232, 999-999-9999	
Linda Sue Gilmore	569 County Road 313, Wilmore, KY, 40390-1108, 999-999-9999	25
River Valley Christian Fellowship Pastor Derick Miller	3417 FM 1856, Jackson, MS, 39212, 999-999-9999	
Diane Dismuke	1315 Victory Palm Dr, Powder Springs, GA, 30127-1504, 999-999-9999	250
Red and Joan Davis	1880 Hamlin Rd, Holland, MI, 49423, 999-999-9999	
Rev. and Mrs. Mark Doll	114 Cleo Ave, Madison, MS, 39110, 999-999-9999	
John and Nicole Curiale	17604 River Walk Dr, 999-999-9999	
		275

Autumnwoods Church at Daily's Chapel	999-999-9999
1449 Old Chipley Rd, Knoxville, TN 37922-2810	email@email.com

Follow-up Reminders

This report gives a list of each of the current follow-up reminders in the system. It will list only those that are classified as "open." Once you categorize a reminder as "closed," it will no longer appear on this particular list.

This is useful for "to do" lists while on deputation.

John and Beth Muehleisen 25 July 14
Follow Up Reminders Page 1

Date	Type	Comment	Name
12-Jul-14	write	thank you note / enjoyed overnight	Mr and Mrs John Dixon, Alapaha, GA
28-Jul-14	call	follow up on committee decision	Trinity Park United Methodist Church
2-Aug-14	visit	lunch scheduled / discuss pledge increase	Mr and Mrs Henry G. Cleveland

E-Mail Addresses

This report gives a list of the e-mail addresses that you have for your ministry partners.

E-Mail List

Sort	Name	Address	E-Mail	Ok to Mail Supp
Asbury	Asbury Congregational Methodist Church	Tuscaloosa AL	email@email.com	
Autumnwoods	Autumnwoods Church at Daily's Chapel	Knoxville TN	email@email.com	
Auxiliary, Georgia	Georgia Prayer Auxiliary	Ashville OH	email@email.com	17
Ayres, Miss Irene	Miss Irene Ayres	Alma GA	email@email.com	
B				
Backlund, Mrs	Mrs Florence M. Backlund	New Wilmington PA	email@email.com	
Baines, Mr and	Mr and Mrs Richard Baines	Edgewater FL	email@email.com	17
Banter, Dr and Mrs	Dr and Mrs Ken Banter	Pleasantville PA	email@email.com	
Barker, Mr and	Mr and Mrs Les Barker	Oneonta AL	email@email.com	20
Barker, Mr. and	Mr. and Mrs. Norm Barker		email@email.com	No
Barnard, Mrs	Mrs Norma D. Barnard		email@email.com	No
Barnes, Mr and	Mr and Mrs R. B. Barnes	Crystal Springs MS	email@email.com	
Barnett, Denise	Denise Barnett	Wellington TX	email@email.com	
Barrager, Mr and	Mr and Mrs Cliff T. Barrager	Emlenton PA	email@email.com	
Barrett, Mr. and	Mr. and Mrs. J.A. Barrett	Tuscaloosa AL	email@email.com	
Barrett, Rev. and	Rev. and Mrs. Alan Barrett		email@email.com	No
Barris, Will and	Will and Jean Barris	Uhrichsville OH	email@email.com; jean.hamilton@somedomain.com	No
Bartels, Bernice	Bernice Bartels	Tampa FL	email@email.com	175
Bartolomeo, Mr	Mr and Mrs Marco Bartolomeo	Auburn AL	email@email.com	
Bassett, Ruthie	Ruthie Bassett	St Clairsville OH	email@email.com	
Batchelor, Mr.	Mr. Giles G. Batchelor		email@email.com	No
Bayler, Rev. and	Rev. and Mrs. LaVon E. Bayler	Kosciusko MS	email@email.com	100
Beall, Mr and Mrs	Mr and Mrs F Dan Beall	Knox PA	email@email.com	33
Bean, Mr and Mrs	Mr and Mrs Sam S Bean	Kosciusko MS	email@email.com	
Beaver, Mr and	Mr and Mrs Ralph Beaver	Greeley CO	email@email.com	

How to Filter Your Reports

The program gives you the ability to choose just certain names from your mailing list to be included on the reports. Normally, for example, you'd want all of the names to be printed when you do a donor reference list. However, if you wanted just to see those people who had Life Investments in you, or those who were pastors, or those who were staff members, you can look at just those lists. The reporting section of the program uses the same listing system that is used in the donor master record.

If you'd like the report not to include all of the names, but only some of the names that are on your user definable lists, click on the button that says "Include All Records" and remove the check mark from that particular box.

Then, put check marks by whatever lists you want to include in your report. This will allow you to quickly include only the names you want on your report.

Basic Filter
Advanced Filter

Include these Donor Types:

All Donor Types

Only One Donor Type:

Is a Donor

Is a Church

Is a Prospect

OK to Solicit

OK to E-Mail

Send Newsletter

Pledged Support

Does Not Have An E-Mail Address

Show Deceased Partners

Hide Inactive Partners

Include partners in these groups:

Use All Groups

Is in any of these groups

Is in all of these groups

Select	Group
<input checked="" type="checkbox"/>	Former Supporte
<input type="checkbox"/>	Hotlist
<input type="checkbox"/>	Indian Springs
<input type="checkbox"/>	Life Share
<input type="checkbox"/>	Need Info
<input type="checkbox"/>	Need New Email Address
<input checked="" type="checkbox"/>	Need to Cultivate
<input type="checkbox"/>	Our Family
<input type="checkbox"/>	Pastor

Monthly Giving Reports

The Monthly Giving Report contains a list of all of the contributions that you have received in a particular month. This report does not include individual gifts (it summarizes a month's giving into one entry). It can be printed in several different sort orders, for example, in order of donation size (from the largest gift to the smallest gift). If this donation is the first donation from a donor, that is noted. Likewise, if it is the largest single gift from the donor, that is noted as well.

This information can be viewed on screen or printed as a report, exported to an Excel spreadsheet or a csv delimited merge file or a FoxPro / dBase file (to use as a source file for a mail merge, for example).

Print Reports, Labels and Envelopes

Reports

Partner Reports
Geographical Reports
Giving Analysis
Other Reports
Monthly Giving Reports
Giving Statements

Labels & Envelopes

Mailing Labels
Envelopes

Export

Export & Merge

Monthly Giving Reports**1. Select a Month:**

May 2014

2. Select a Destination:

- Monthly Giving Report
- Monthly Giving Report with Trailing 12 Month Analysis
- Excel Spreadsheet
- Delimited Merge File
- FoxPro / dBase .dbf file

3. Specify an Order:

- Alphabetical Order
- Donor ID Number Order
- Zip Code Order
- Largest to Smallest Gift

4. Run the Report

Create !

7

Mailing Labels

The donor manager system allows you to print mailing labels in various layouts and formats for use in newsletters and prayer letters.

The screenshot shows the 'Print Reports, Labels and Envelopes' interface. It features a navigation menu on the left with sections for Reports, Labels & Envelopes, and Export. The main content area is titled 'Select Label Format' and includes a table of label formats, sorting options, and various filter checkboxes.

Paper	Printer	Size	Across	Avery Number
US	Ink Jet	1 x 3 7/8	3	5260
US	Ink Jet	1 x 4	2	5261
A4	Ink Jet	38 mm x 64 mm	3	7150
A4	Ink Jet	38 mm x 99 mm	2	7153
US	All	1 x 2 5/8	3	5150

Sort Order:
 Alphabetical Order
 Zip Code Order

Print Range:
 Print All Names
Begin Name: _____
End Name: ZZZ

Label Options:
 Print USA on USA Addresses
 Print Address in All Uppercase
 Omit "Do Not Solicit" Names

Buttons: Preview Labels, Print Labels, Count Names

Filters:
Include these Donor Types:
 All Donor Types
 Only One Donor Type: _____
All Giving Patterns: _____
All Partner Phases: _____
 Is a Donor
 Is a Church
 Is a Prospect
 OK to Solicit
 OK to E-Mail
 Send Newsletter
 Pledged Support
 Does Not Have An E-Mail Address
 Show Deceased Partners
 Hide Inactive Partners

Include partners in these groups:
 Use All Groups
 Is in any of these groups
 Is in all of these groups

Select	Group
<input checked="" type="checkbox"/>	Former Supporter
<input type="checkbox"/>	Hotlist
<input type="checkbox"/>	Indian Springs
<input type="checkbox"/>	Life Share
<input type="checkbox"/>	Need Info
<input type="checkbox"/>	Need New Email Address
<input checked="" type="checkbox"/>	Need to Cultivate
<input type="checkbox"/>	Our Family
<input type="checkbox"/>	Pastor

The system is relatively easy to use. Simply select the label layout from the list of pre-defined label formats, and then specify whether you want all of the names printed or just some of the names printed and you're basically ready to go.

There are a few other options that you may find useful. Let's look at these:

First of all, you can specify whether you want the mailing labels to be printed in alphabetical order, or ZIP code order.

Also, you can specify whether you want the letters "USA" to appear on the labels for the American addresses. Normally, when you're in the United States on deputation, you do not want the letters USA to appear on your mailing labels. However, when you are overseas you do need that to be part of the mailing label. This feature allows you to turn this on or off as appropriate in your situation.

You also have the option of having the program print all addresses in upper case letters. The post office prefers it to be done this way. Although cosmetically it is not very attractive, you may find that this option is of benefit to you.

If you do not want the names on your mailing list that are marked for “no solicitation” included in the label set, simply put a check mark on the “Omit ‘Do Not Solicit’ names.” Any named tagged “Do Not Solicit” will be left out of the mailing labels that you are printing.

Once you have set the options that you want, simply click the “Print Labels” button. You will get a preview of the labels on the screen that you can look at first, and then when you’re ready to send the labels to the printer, simply click the printer icon on the top of your preview screen and your mailing labels will be sent to the printer of your choice.

Also, if you click the button titled “Just Count Names,” the program will simply report the number of partner names that meet the criterion that you have selected.

You can also filter the names to include on your labels using the same type of options that are available on the reports menu.

8

Exporting Donor Manager Data to Other Programs

There may be times when you want to take the information that is in the donor manager program and use it in other software. For example, you may wish to use the donor file as the source for mail merge in Microsoft Word. Likewise you may choose to use Microsoft Word or some other program to do your mailing labels or your envelopes (in fact, this is actually recommended!).

From this screen, you can choose to export your data from the donor master file in several different formats. You can export as a dBASE / FoxPro type file, as an Excel file, or as a text file (delimited with commas) which can be used as a data source for many different programs. You can choose to export all the records in your file, or just some of them using the standard filter mechanism.

The screenshot shows the 'Print Reports, Labels and Envelopes' screen in the Donor Manager software. The navigation menu on the left includes sections for Reports, Labels & Envelopes, and Export. The main content area is titled 'Select Export Format' and contains three radio button options: 'dBase / FoxPro format (.dbf)', 'Excel format (.xls)', and 'Comma Delimited text file (.txt / .csv)'. Below this is a 'Select a Field List:' section with two radio button options: 'for Mail Merge & Envelopes' and 'All Fields'. A blue 'Export' button is located at the bottom of the main content area.

HOME PARTNERS DETAILS CHURCHES GROUPS GIFTS PARTNER

Print Reports, Labels and Envelopes

Reports

- Partner Reports
- Geographical Reports
- Giving Analysis
- Other Reports
- Monthly Giving Reports
- Giving Statements

Labels & Envelopes

- Mailing Labels
- Envelopes

Export

- Export & Merge

Select Export Format

- dBase / FoxPro format (.dbf)
- Excel format (.xls)
- Comma Delimited text file (.txt / .csv)

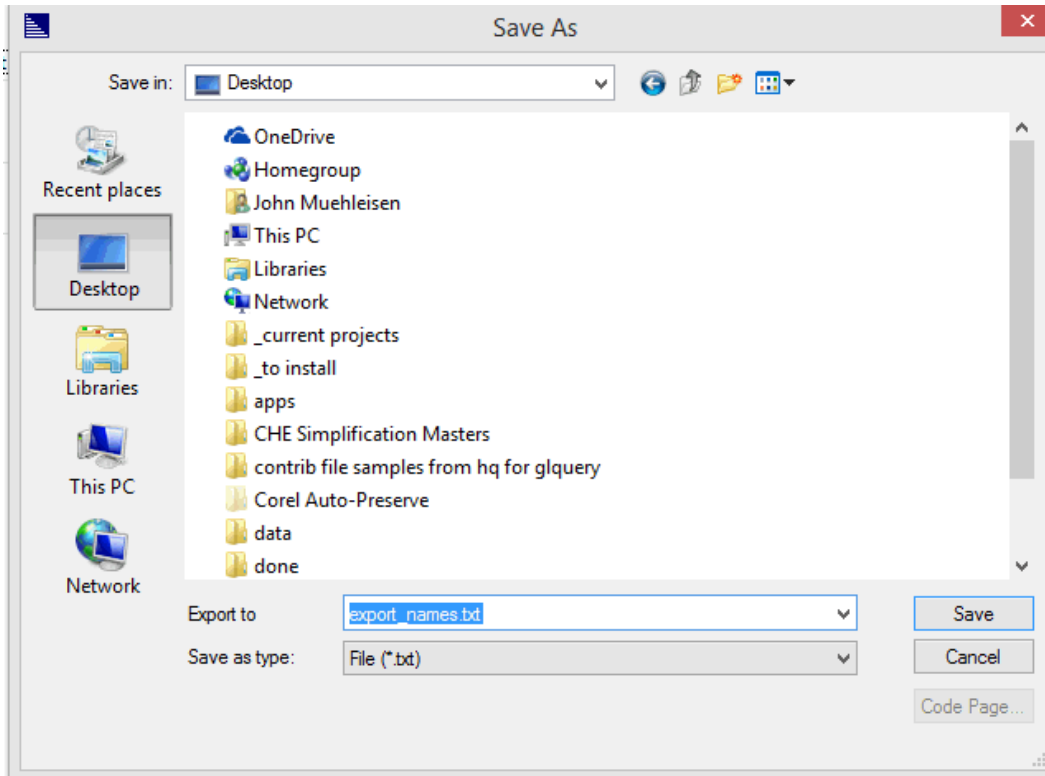
Select a Field List:

- for Mail Merge & Envelopes
- All Fields

Export

If you want to use data in the donor manager as a data source for a mail merge using Microsoft Word, it is recommended that you use the “Export to Excel” option. Excel is an excellent and easy to use data source option for Word mail merges.

If you have a tablet there is an export option that works well for this. You can export the data to Excel format or dBase / FoxPro format depending on the software you are using on your tablet computer. There are a number of freeware and commercial programs available that will work well.



9

Printing Envelopes

The Donor Manager gives you two ways to print envelopes. If you want to print a single envelope, you can click the “Print Envelope” button on the individual’s detailed information screen.

If you want to print envelopes for a large number of contacts, use the “Envelopes” routine on the Reports menu. The program takes the records that match the criteria you specify and sends them to Microsoft Word for printing. Word has a lot of helpful options that you can use when printing envelopes.

The screenshot shows the 'Print Reports, Labels and Envelopes' screen in the Donor Manager software. The interface is divided into several sections:

- Navigation Bar:** HOME, PARTNERS, DETAILS, CHURCHES, GROUPS, GIFTS, PARTNER DEVELOPMENT, **REPORTS**, CHARTS, E-MAIL.
- Left Sidebar:**
 - Reports**
 - Partner Reports
 - Geographical Reports
 - Giving Analysis
 - Other Reports
 - Monthly Giving Reports
 - Giving Statements
 - Labels & Envelopes**
 - Mailing Labels
 - Envelopes
 - Export**
 - Export & Merge
- Main Content Area:**
 - Select Word Envelope Template:** A text box contains the file path '\DONOR6\envelope.doc'. Below it are 'Select File' and 'Edit Envelope Template' buttons.
 - Sort Order:** Radio buttons for 'Alphabetical Order' (selected) and 'Zip Code Order'.
 - Print Range:** A checkbox for 'Print All Names' and two text boxes for 'Begin Name' and 'End Name' (containing 'ZZZ').
 - Envelope Options:** Checkboxes for 'Print USA on USA Addresses', 'Print Address in All Uppercase', and 'Omit "Do Not Solicit" Names' (checked).
 - Buttons:** 'Send Envelopes to Word for Printing' and 'Just Count Names'.
 - Filtering:** 'Basic Filter' and 'Advanced Filter' tabs. Below them, a section titled 'Include these Donor Types:' contains radio buttons for 'All Donor Types' (selected) and 'Only One Donor Type:'. Below this are two dropdown menus for 'All Giving Patterns' and 'All Partner Phases'. A list of checkboxes includes 'Is a Donor', 'Is a Church', 'Is a Prospect', 'OK to Solicit', 'OK to E-Mail' (checked), 'Send Newsletter' (checked), 'Pledged Support', 'Does Not Have An E-Mail Address', 'Show Deceased Partners', and 'Hide Inactive Partners'.

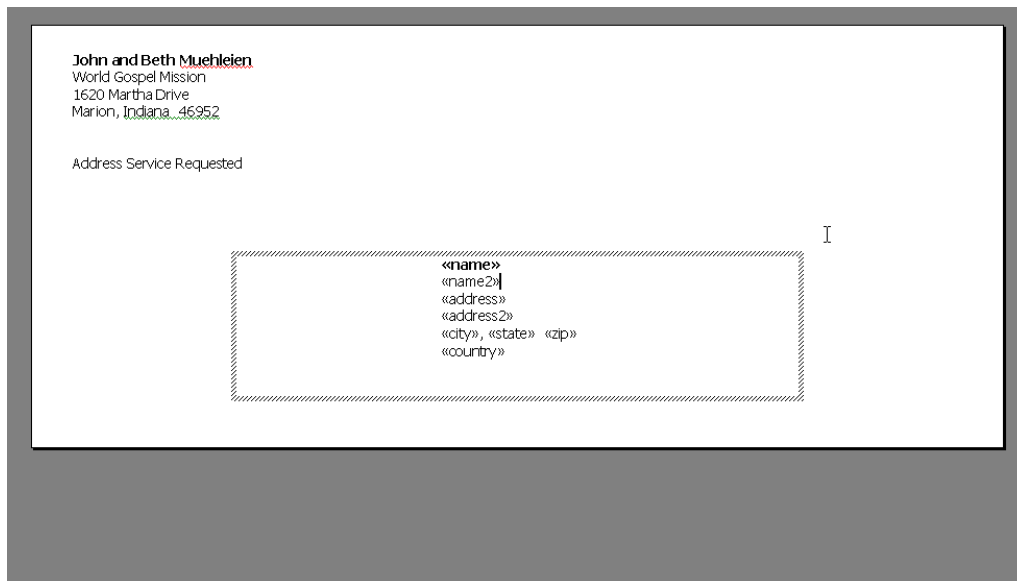
The program comes with a pre-defined envelope format in Microsoft Word format. You should edit this envelope to personalize it with your return address and any other options you may want to use.

If you decide to modify the envelope file or create your own, the proper merge fields must be used. The merge fields are as follows:

Name: the contact's name
Name2: the second name line
Address: the contact's address
Address2: the second address line , if any
City: the contact's city
State: the contact's state
Zip: the contact's zip code / postal code
Country: the contact's country

When the envelope prints, any blank lines will be closed up so that the address formats properly.

Here is what the sample envelope looks like:



Once you have selected the filter (if any) and other envelope printing options., click the button labeled "Send Envelopes to Word for Printing." After a few seconds of processing, Word will start up and will show the merged envelopes ready to print. Be sure to check your printer settings so that the paper size is set to be "Envelopes."

10

Bulk E-Mailing Tools

The Donor Manager provides help to you if you communicate with your ministry partners via e-mail.

In each donor master record, you can record an e-mail address for the person. The program will gather those e-mail addresses and help you to address e-mails to each of those people.

The screenshot shows the 'Send Bulk E-Mail Messages' page in the Donor Manager software. The interface includes a navigation bar at the top with tabs for HOME, PARTNERS, DETAILS, CHURCHES, GROUPS, GIFTS, PARTNER DEVELOPMENT, REPORTS, CHARTS, and E-MAIL. The main content area is titled 'Send Bulk E-Mail Messages' and is divided into three columns.

E-Mail Tools (Left Column):

- Import Names
- My E-Mail Address

Send Bulk E-Mail (Middle Column):

- Prepare and Address a New Message**
Create a new e-mail message, pre-addressed to all addresses in your mailing list.
- Put E-Mail Addresses on Clipboard**
Put a copy of all email addresses on the clipboard, ready to paste into the address block of your e-mail program.
- Create an E-Mail Merge Source File**
Create an Excel file to be used as a source file for merging personalized e-mails in Word or other bulk e-mail programs.

Additional E-Mail Options (Middle Column):

- E-Mail Addresses Report**
Print a list all of the e-mail addresses for your partners
- Use Batches for E-Mail Batch Size:
- I use Thunderbird for E-Mail.

Basic Filter / **Advanced Filter** (Right Column):

- Include these Donor Types:**
 - All Donor Types
 - Only One Donor Type:
- All Giving Patterns:
- All Partner Phases:
- Is a Donor
- Is a Church
- Is a Prospect
- OK to Solicit
- OK to E-Mail
- Send Newsletter
- Pledged Support
- Does Not Have An E-Mail Address
- Show Deceased Partners
- Hide Inactive Partners

Sending a New Message

The Donor Manager can help you prepare and address a new e-mail message to your ministry partners. Select the option “Prepare and Address a New Message” and the program will gather all of your e-mail addresses (those marked “OK to E-Mail” in the partner master record), and prepare a new e-mail message using your default e-mail client with those addresses in the “bcc:” address line. You can then prepare your message using your e-mail client.

Put Addresses on the Clipboard

There will be times that you will not want the Donor Manager to prepare the e-mail message for you, but you still want easy access to the e-mail addresses in the program.

Choosing the menu option titled “Put Addresses on the Clipboard” gathers the e-mail addresses from your ministry partners, and places that address list on the Windows Clipboard.

You can then start up your e-mail program, prepare a message and place your cursor in the bcc: address line of the message. Press <Control V> or /Edit /Paste and the e-mail address list will be pasted into your message for you.

Working with Batches

Many e-mail systems put limits on the number of messages that you can send at one time, or the number of recipients that a single message can have. This is frequently done as an anti-spam technique.

The Donor Manager give you the option of breaking your e-mail list into “batches” or groups (of a size that you specify), and then working with each batch one at a time.

If you decide to use the batch option, simply put a checkmark in the box titled “Use Batches for e-mail” and then specify the maximum number of addresses that you would like to have in each batch.

Then, when you choose one of the e-mail options, the program will bring up an additional screen allowing you to select which batch to work with.

Send Bulk E-Mail

Prepare and Address a New Message

Create a new e-mail message, pre-addressed to all addresses in your mailing list.

Put E-Mail Addresses on Clipboard

Put a copy of all email addresses on the clipboard, paste into the address block of your e-mail program.

Create an E-Mail Merge Source File

Create an Excel file to be used as a source file for personalized e-mails in Word or other bulk e-mail program.

Additional E-Mail Options

E-Mail Addresses Report

Print a list all of the e-mail addresses for your partner.

- Use Batches for E-Mail Batch Size:
- I use Thunderbird for E-Mail.

Basic Filter Advanced Filter

Include these Donor Types: Include partner

E-Mail Batches

Total E-Mail Address:

Batch Size:

Send Addresses to:

Clipboard E-Mail Message

Select Batch:

- Batch 1: Dr Joseph P Luce <Deceased> through Mr and Mrs Aaron Johnson
- Batch 2: Mrs Alwilda Warner through Mrs. Peggy Miller
- Batch 3: Mr and Mrs Samuel L Cowart Jr through Mr and Mrs David T. Hawk
- Batch 4: Mrs Charlotte Collier through Dr. Mary Hermiz
- Batch 5: Mr and Mrs William Goss through Oak Grove Independent Methodist Church
- Batch 6: Mr and Mrs Earl Hudson Jr through Dr. and Mrs. Don Hohensee
- Batch 7: Rev and Mrs Robert S. Patterson through Mr and Mrs Franklin McCants
- Batch 8: Mr and Mrs F Dan Beall through Mr and Mrs Foster G. Davis
- Batch 9: Mrs. Mary Lynn Ayers through Mrs. W.A. Hester
- Batch 10: Mr and Mrs Robert T Mattox through Mr and Mrs Ronald Davis
- Batch 11: Andy and Joyce Maitland through Mr and Mrs Doug Adkins
- Batch 12: Mr. J.D. Patrick through Mr and Mrs David L. Troyer
- Batch 13: Grace Evangelical Congregational Church through Asbury College Student
- Batch 14: Dr and Mrs Martin Graber through Sweetwater First EMC
- Batch 15: Mr. John Lunceford through Eva Donahue
- Batch 16: Shirley E Haggerty through Mr and Mrs Ronald J. Emery
- Batch 17: Mrs Hazel M. Lewis through Ms Betty Dennison
- Batch 18: Killen United Methodist Church through Westview Wesleyan Church
- Batch 19: Hillcrest Independent Methodist Church through Doris W. Orders

Process Batch

Close

Each batch can be sent to a new (blank) e-mail message, or the address list can be placed on the Window Clipboard, ready for you to paste (via Control-V or /Edit /Paste) into the program of your choice. When you click the button <Process Batch>, the list of addresses will go to the new message or the clipboard (as you have selected), and then the batch list will move to the next batch automatically.

Creating an E-Mail Merge Source File

The Donor Manager can create an Excel data file that is designed to be used as a merge source for a personalize e-mail merge. There are many programs (Microsoft Word is great for this) that allow you to personalize your e-mail messages and send out individual, personalized messages. Use the file created here as the source for these merges.

E-Mail Addresses Report

This report gives a list of the e-mail addresses that you have for your ministry partners.

John and Beth Muehleisen
E-Mail List

25 July 14 1:03 pm
 Page 2

Sort	Name	Address	E-Mail	Ok to Mail	Supp
Asbury	Asbury Congregational Methodist Church	Tuscaloosa AL	email@email.com		
Autumnwoods	Autumnwoods Church at Daily's Chapel	Knoxville TN	email@email.com		
Auxiliary, Georgia	Georgia Prayer Auxiliary	Ashville OH	email@email.com	17	
Ayres, Miss Irene	Miss Irene Ayres	Alma GA	email@email.com		
B					
Backlund, Mrs	Mrs Florence M. Backlund	New Wilmington PA	email@email.com		
Baines, Mr and	Mr and Mrs Richard Baines	Edgewater FL	email@email.com	17	
Banter, Dr and Mrs	Dr and Mrs Ken Banter	Pleasantville PA	email@email.com		
Barker, Mr and	Mr and Mrs Les Barker	Oneonta AL	email@email.com	20	
Barker, Mr. and	Mr. and Mrs. Norm Barker		email@email.com	No	
Barnard, Mrs	Mrs Norma D. Barnard		email@email.com	No	
Barnes, Mr and	Mr and Mrs R. B. Barnes	Crystal Springs MS	email@email.com		
Barnett, Denise	Denise Barnett	Wellington TX	email@email.com		
Barrager, Mr and	Mr and Mrs Cliff T. Barrager	Emlenton PA	email@email.com		
Barrett, Mr. and	Mr. and Mrs. J.A. Barrett	Tuscaloosa AL	email@email.com		
Barrett, Rev. and	Rev. and Mrs. Alan Barrett		email@email.com	No	
Barris, Will and	Will and Jean Barris	Uhrichville OH	email@email.com; jean.hamilton@somedomain.com	No	
Bartels, Bernice	Bernice Bartels	Tampa FL	email@email.com	175	
Barlomeo, Mr	Mr and Mrs Marco Barlomeo	Auburn AL	email@email.com		
Bassett, Ruthie	Ruthie Bassett	St Clarksville OH	email@email.com		
Batchelor, Mr.	Mr. Giles G. Batchelor		email@email.com	No	
Bayler, Rev. and	Rev. and Mrs. LaVon E. Bayler	Kosciusko MS	email@email.com	100	
Beal, Mr and Mrs	Mr and Mrs F Dan Beal	Knox PA	email@email.com	33	
Bean, Mr and Mrs	Mr and Mrs Sam S Bean	Kosciusko MS	email@email.com		
Beaver, Mr and	Mr and Mrs Ralph Beaver	Greeley CO	email@email.com		

My E-Mail Address

Use this routine to enter your return e-mail address, and to indicate if you are using Thunderbird as your e-mail program.

Bulk E-Mailing Tips

Here are a few tips to help you with your e-mail newsletters to your constituency:

- Use Word as your e-mail editor. The additional formatting tools available in Word can really help improve the appearance of your e-mails.
- Consider using an add-on program for e-mailing. I use a program called “High Impact E-Mail” (www.templatezone.com) for its professionally designed e-mail templates.
- Consider sending personalized e-mails. Although this feature may be added to the Donor Manager in the future, personalized bulk e-mail programs can be a useful communications tool. Check the Donor Manager web site at www.donormanager.com for recommendations and links.

11

Tools

The program provides a number of tools and utility routines that you need to use from time to time. These are listed on the tools menu. Let's take a look at each one of them:

Backup and Restore

It is important to have backup copies of your donor mailing list, and the program makes it easy for you to do this. There are two types of backup provided for you.

The screenshot displays a web application interface for 'Tools and Utilities'. At the top, a navigation bar includes links for HOME, PARTNERS, DETAILS, CHURCHES, GROUPS, GIFTS, PARTNER DEVELOPMENT, REPORTS, and CHARTS. Below this, a blue header reads 'Tools and Utilities'. A left sidebar lists various tool categories: Tools (Backup & Restore, Program Settings, Lists and Codes, Table Statistics), Data Maintenance (Import Data into DM), and a section for 'Set Automatic Backup Options'. The main content area is titled 'Backup and Restore Data Tables' and is divided into four sections: 'Quick Backup' (with a 'Quick Backup' button and a note about saving to the My Documents folder), 'Restore from a Quick Backup' (with a 'Quick Restore' button), 'Full Backup' (with a 'Full Backup' button and a checked checkbox for '.zip file'), and 'Restore from a Full Backup' (with a 'Full Restore' button and an unchecked checkbox for '.zip backup file').

Quick Backup

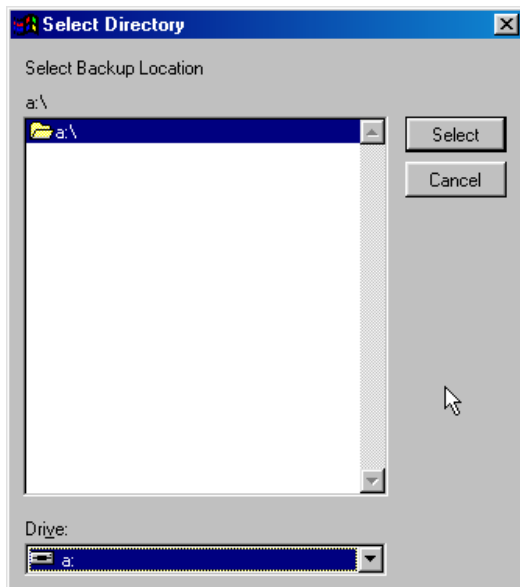
The first option is the “quick backup.” The quick backup simply makes a second copy of all of your donor data in another folder on your hard drive. This data is put into a folder titled “quikback” underneath your main Donor Manager folder (usually c:\donor5). It is useful just to have a spare copy on your hard drive of your donor data. Obviously this doesn’t protect you if something goes wrong with your computer, if it is lost or stolen, etc.

The program also makes another copy of your donor data in your “My Documents Folder” in a folder titled “Donor Manager Backup.”

Making a quick backup takes only a few seconds, so the program gives you the option of doing a “Quick Backup” every time you exit the program. This adds 2 or 3 seconds to the program shutdown time, but it makes 2 sets of backup files of your donor data.

Full Backup

The second option is the “full backup.” This option allows you to specify the destination of the backup files. Generally you will back up to a flash drive, an external hard disk, a OneDrive or DropBox folder, or another folder on your hard drive (that is also backing up somewhere “off site”). Use this option to specify where you’d like a backup set to go.



If you want to back up to a CD-R drive, you can backup your data using your CD-R creation software. Simply backup the folder c:\donor6\data, (or the entire c:\donor6 folder). If you want to backup to CD-R from within the Donor Manager program, you have to use special software (sometimes provided with your CD burner) to allow the CD-R drive to behave as a normal disk drive.

If you don’t use this particular feature, however, then you need to actually do your backups from outside of the Donor Manager using whatever backup software is provided for you with your CD burner.

Additional Data Backups

The Donor Manager also makes a two other backups of your partner information each time the program closes. As mentioned above, one backup is placed in your “My Documents” folder (in a sub-folder titled “Donor Manager Data Backup” (you can change the name of this folder if you wish).

Another copy of your mailing list is saved in Excel format in your “My Documents” folder. The default title for this file is “PartnerNames.xls”, but you can change this if you wish. This is very useful to use as a data source for mail merges from other programs. Since the Donor Manager updates this file each time it closes, you can use this file in the “My Documents” folder easily as an up-to-date merge source.

Changes to how this routine works is done on the “Personalize” screen.

Personalize User Information

HOME PARTNERS DETAILS CHURCHES GROUPS GIFTS PARTNER DEVELOPMENT REPORTS CHARTS E-MAIL LISTS TOOLS QUIT

Tools and Utilities John and Beth Muehleisen

Tools

- Backup & Restore
- Program Settings
- Lists and Codes
- Table Statistics
- Data Maintenance
- Import Data into DM

Personalize the Donor Manager

My Information

- Editing Options
- Default Data
- Auto Backup Options
- Custom Terms
- Bulk Envelope Options
- Mapping Options
- Single Envelope Options
- Report Options

My Information

My Name and Address

User Name

Address

My E-Mail Information

E-Mail
 I use AOL for my E-Mail
 I use Thunderbird for E-Mail

Other Information

I am with WGM - use WGM Snapshot Tools
 I am with CCCU - use CCCU Tracking

The “My Information” screen allows you to customize the donor manager for yourself. This is where you record your name, your mailing address, your e-mail address, as well as additional personal information.

Defining Late Donors

The program gives you the ability to get a list of “Late Donors.” This report, available from the Reports Menu, lists pledged ministry partners who have not made a contribution in the past several months. This is the place where you specify how many months is considered “late.”

Editing Options

Under normal circumstances, you will not want to change the information in the donor giving history screen. However, if for some reason you do want to manually make changes to that information, put a check mark here and the program will allow you to edit the giving history information directly in the grid. Use with caution!

Envelope Setup

Personalize the Donor Manager

- My Information
- Editing Options
- Default Data
- Auto Backup Options
- Custom Terms
- Bulk Envelope Options
- Mapping Options
- Single Envelope Options
- Report Options

Single Envelope Settings

Single Envelope Options

- Print Return Address on Envelopes
- Print Country on Default Country Addresses
- Preview envelope before printing from partner detail screen

Select Envelope Size

- Standard # 10 envelope
- 4 x 6 Note Card Envelope

Envelope Message:

Select Printer Driver for Single Envelopes

On the “Envelope Setup” tab, you can customize how the program handles envelopes. There are a number of settings you can customize for your situation.

You can tell the program how your printer handles single envelope printing. You can also set your preferences on how addresses are formatted on envelopes. In addition, you can specify a message to be printed on the single envelopes (such as “Address Service Requested” or “Second Class Airmail” or “A special message from John and Beth Muehleisen”.)

You can also specify and optionally edit the Microsoft Word file that the program uses for bulk printing of envelopes.

Regions

Customize Codes Used by the Program

Region Codes

Region	Description	States
SE	Southeast Region	FL,GA,TN,NC,SC,AL,LA,MS,
NE	Northeast Region	MA,ME,NH,VE,NY,PA,MD,VA,NJ,RI,CT,WV
CE	Central Region	OH,IN,MI,KY,IL,MO,AR,TX,OK,NE,OK,SD,MN,KS
NW	Northwest Region	WA,OR,CA,WY,ID,UT,CO,AZ,NM,WY,IA,MT

Regions are Based on:
 States
 Countries

[Add New](#) [Delete](#) [Update Donor Info](#)

Many organizations divide the home country up into a number of regions. These regions change from time to time as the organization realigns various regional offices. The screen allows you to specify which states or countries are in which regions. This is used for analyzing your base of support by region. This information is useful when you try to decide how to allocate your time while on home ministry assignment.

Denominations

Customize Codes Used by the Program

Denomination Codes

Code	Description
AIM	Independent Methodist
BAP	Baptist
CCCU	Christian Union
CMC	Congregational Methodist
ECNA	Evangelical Church
EMC	Evang Methodist
IND	Independent
NAZ	Nazarene
OTHE	Other
PRES	Presbyterian
UMC	United Methodist
WES	Wesleyan

[Add New](#)
[Delete](#)

On this screen you simply list the abbreviation and the full name of the various denominations that you wish to track. Whenever you enter here will appear on the list of valid denominations in the the donor master file.

Donor Types

Customize Codes Used by the Program

- Region Codes
- Denomination Codes
- Partner Types**
- Pledge Source Codes
- Gift Fund Codes
- Gift Motive Codes
- Partnership Phase Codes

Type	Description	Order
SU	Regular Support	1
CA	Cash Donations	4
LI	Life Investment	5
SC	Supporting Chur	5
CH	Church Non Supp	5
FO	Former Support	5
WG	WGM Staff	5
MD	Major Donor	7
SP	Special Gifts	8
-		9

Add Type

Delete Type

On the screen, enter the donor types that you want to be able to keep track of. The program comes with a number of donor types pre-defined. You are welcome to add to or subtract from this list.

Table Statistics

Data Table Statistics

Data File Sizes

Donor Master File	972 records	1,808,001 bytes
Donor Gift Records	4021 records	982,252 bytes
Special Event Entries	10 records	11,925 bytes
Donor Touches Entries	584 records	152,945 bytes

Partner Development Phase Totals

Partner Phase	#	%
Appt Sched	1	0.1
Ask in Fut	6	0.6
Call for D	1	0.1
Never Cont	2	0.2
Partner -	17	1.7
Partner - Financial	139	14
n/a	775	80

List Statistics

Is a Donor	763	81.0%
Is a Church	139	14.7%
Is a Prospect	169	17.9%
OK to Solicit	735	78.1%
OK to E-Mail	753	80.0%
Newsletter	689	73.2%

Partner Type Totals

Donor Type	#	%
-	340	35
Cash Donations	1	0.1
Church Non Supp	94	9.7
Former Support	59	6.1
Life Investment	32	3.3
Supporting Chur	11	1.1
Special Gifts	190	20
Regular Support	116	12
WGM Staff	42	4.3

The Table Statistics screen shows certain information about the number of records in your files and the actual sizes of the data files on your hard drive.

Custom Terms

Personalize the Donor Manager

- My Information
- Editing Options
- Default Data
- Auto Backup Options
- Custom Terms**
- Bulk Envelope Options
- Mapping Options
- Single Envelope Options
- Report Options

Customize User Definable Terms and Fields

User Definable Terms

You can specify the terminology that the program uses to refer to your partners, the groups that they may be associated with, and the associations that their groups may be a part of. Changes made here will take effect the next time the program starts.

Partners	Ministry Partners
Groups (plural)	Churches
Groups (singular)	Church
Associations	Denomination

Other User Definable Fields

	Individuals	Churches
User Field 1	Family Info	Pastor Name
User Field 2	Occupation	Church Info

The program gives you some options for the terminology that I uses for various things.

For example, if you prefer to call your “Ministry Partners” “Donors,” you can change that. Or you may wish to refer to them as “Friends.”

Likewise, instead of using the word “Churches” to refer to groups that your partners are connected with, you can use the term “Groups” or “Associations.”

These terminology changes may be useful in certain contexts in the world.

12

Importing Names and Addresses

If you are starting to use the Donor Manager (or evaluating it for possible use), there is a good chance that you already have a number of names and addresses of partners in another program. The Donor Manager has two import tools that can help you import your data into the program and save you the time of retyping.

The program has an import tool for Outlook, and an import tool for Excel. Since most other database programs can create a file in Excel format (or a format that Excel can import, such as .csv), this will probably meet your needs.

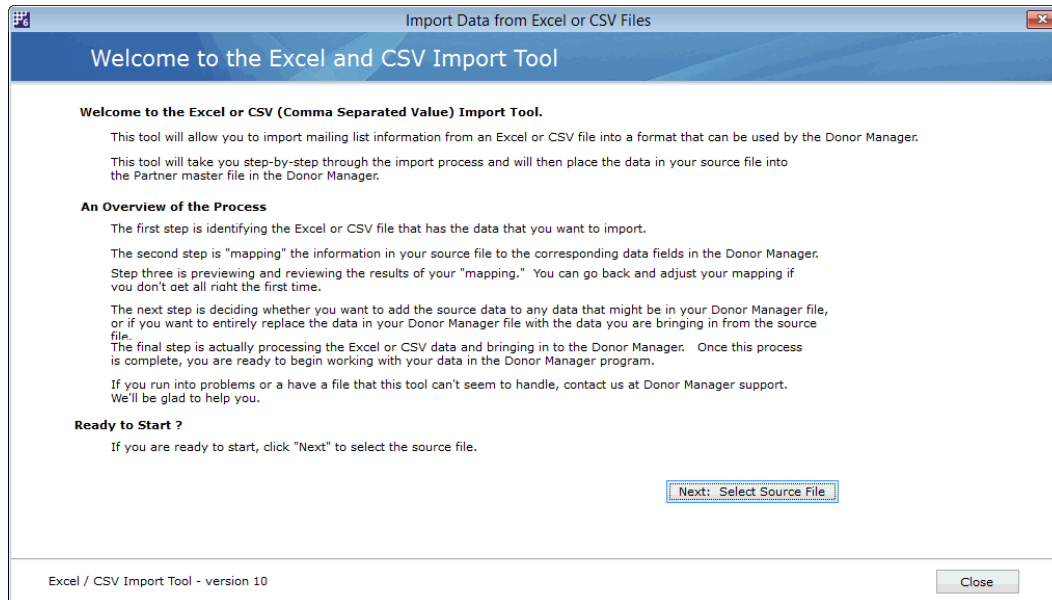
Note, if you have your data in Access, you can easily save your Access table as an Excel file and then use the Excel import tool.

If you have need for help importing your data from another program, please feel free to contact us – we'll be glad to help! Really! Send an email to:

support@donormanager.com.

Importing Information from Excel

If you have your information in an Excel file (or can get it into an Excel file), use the Donor Manager Excel Import Tool. This tool is located on the pull down “Tools” menu (/Tools /Import /Import from Excel).



The first screen of the import tool will give you some general information and instructions about how it works. Click <Next> to select the Excel file that will be the source of the data you want to import.



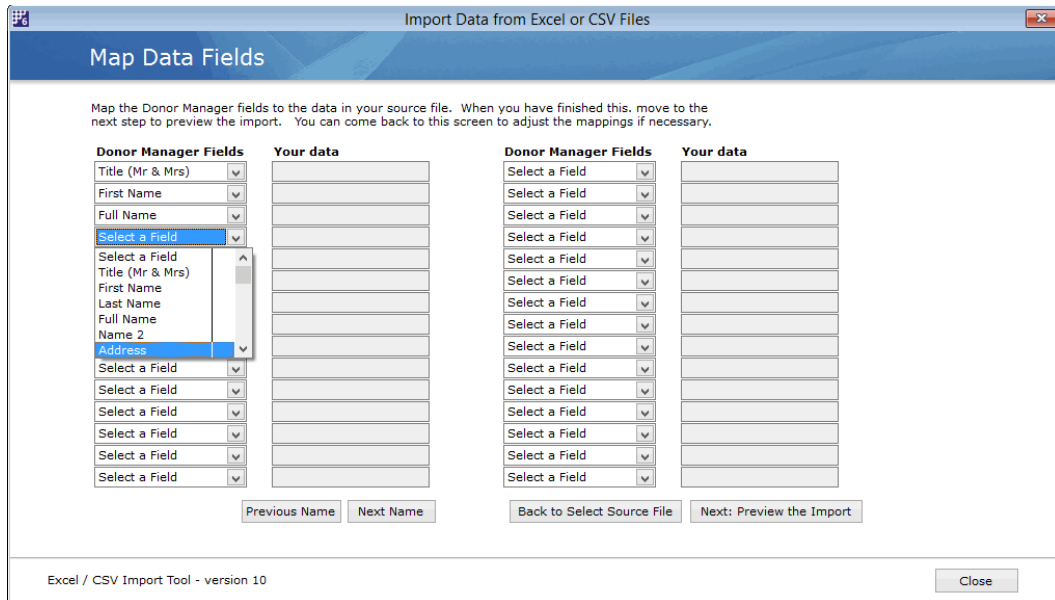
The next step in the import process is to “Map” your data fields to the corresponding field in the Donor Manager. This process generally requires a little experimentation, and if you don’t get it exactly right the first time, you can go back and repeat the process.

The key in this step is to try to identify how your data will correspond to Donor Manager data. Many times, there will be an obvious and exact match for your data in the Donor Manager. Other times, the match will not be as obvious, and there may be times where data that you have simply doesn’t have a corresponding data file in the Donor Manager, or the Donor Manager can’t handle the conversion automatically.

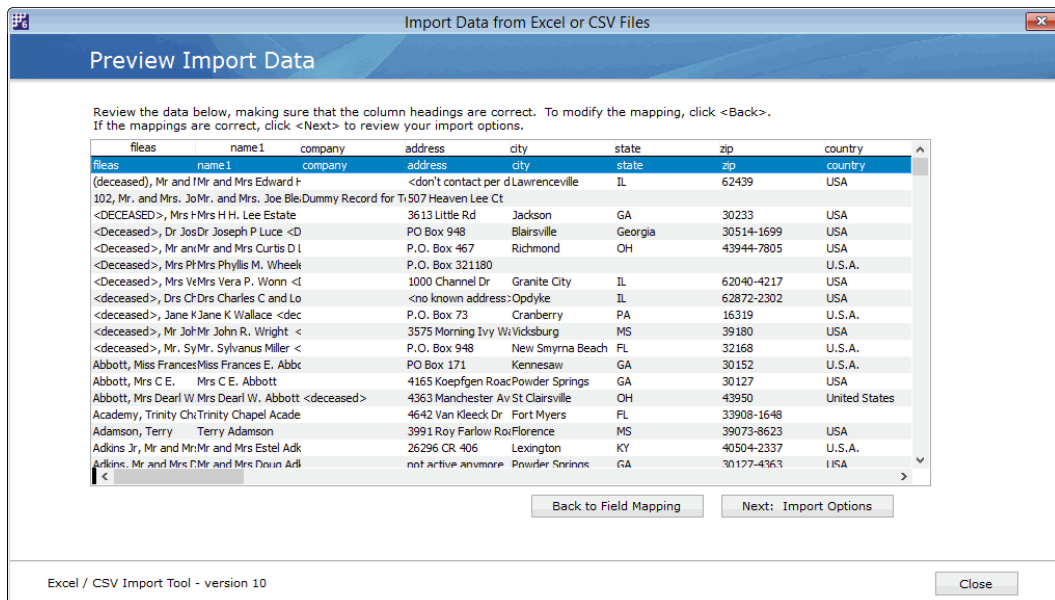
However, most of the time, the most essential information will convert quickly and easily.

The program will present you a list of the fields in your data file (or samples of the actual data in your data file) for you to “map” to Donor Manager data fields. Using the pull-down boxes titled “Select a Field”, find the Donor Manager data field that most closely corresponds to what you have in your original data table.

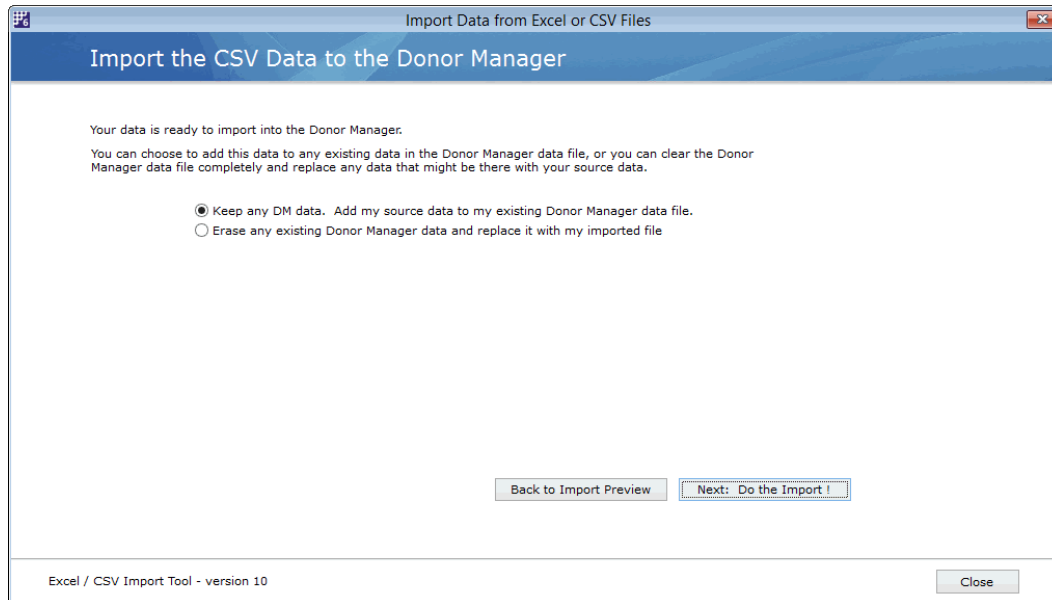
This tool can import up to 30 fields from an Excel file. If you have more fields in your source file, contact us for help with the import.



Once you have mapped your data fields, you are ready to preview the results. Click on the <Next: Preview the Import> button to see what the Donor Manager proposes to do with your data.



Take some time to review the proposed import. If you need to, you can return to the field mapping page to make changes to the mapping scheme that you have chosen. Once you are satisfied with your mappings, click on the <Next: Import Options> button.



The final step is to decide if you want to add this new data to your Donor Manager data file, or if you want to replace any existing Donor Manager data with this imported data.

If you don't have any information in your Donor Manager partners file, then it doesn't make any difference what you choose. If you have some sample data in the Donor Manager file that you have been experimenting with, you may want to have it erased and replaced by what you import.

However, if there is real data that you want to keep in your Donor Manager partners file, then you should choose to keep that data and add the imported data to it. If you end up with some duplicates, you can always remove the duplicate records later.

Once you choose the <Do the Import> button, the program will bring your new data into the Donor Manager and will report how many names it imported.

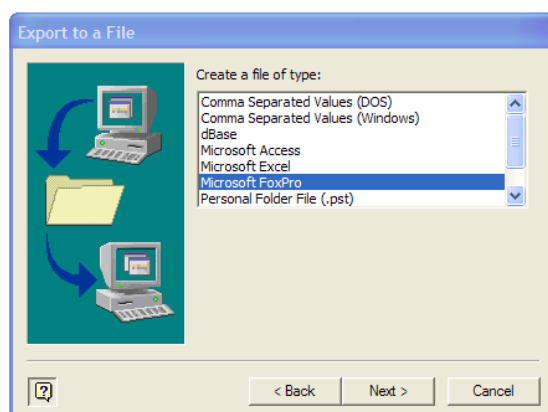
Importing Information from Outlook

If you have your information in Outlook (not Outlook Express), the Donor Manager can import much of the information from Outlook.

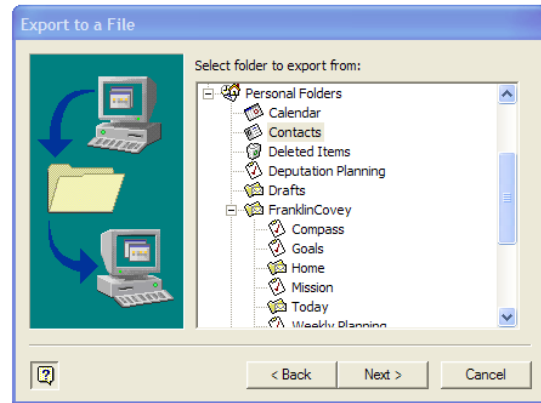
The Outlook to Donor Manager import is a two step process. First of all, you will “export” your data from Outlook into a FoxPro format, and then have the Donor Manager import that file.

To export your data from Outlook, start Outlook and choose /File /Export /Export to a File.

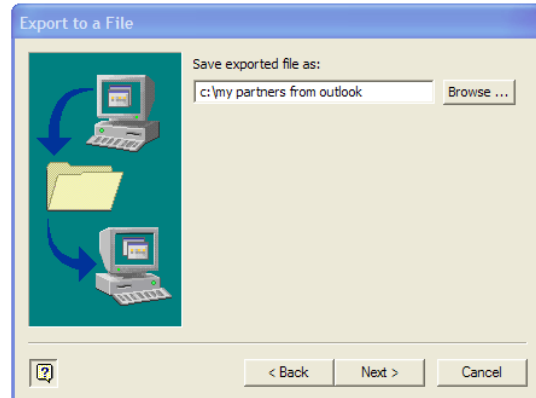
Outlook will then ask what type of file you wish to create. Select “Microsoft FoxPro” from the list of file types.



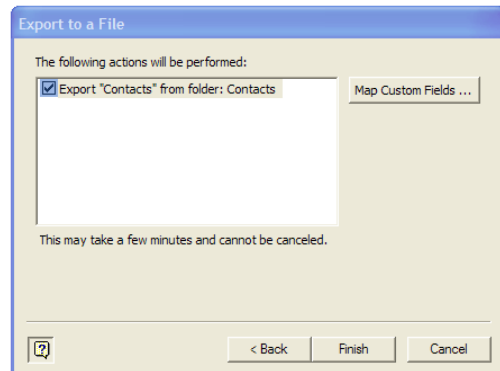
Outlook will then ask what folder you wish to Export. Select "Contact" (or whatever folder you use for your ministry partners.)



The final step in the export is to name the file. Be sure to remember what folder you put the file in and the name that you give it as you will need that information when you are importing that file into the Donor Manager.

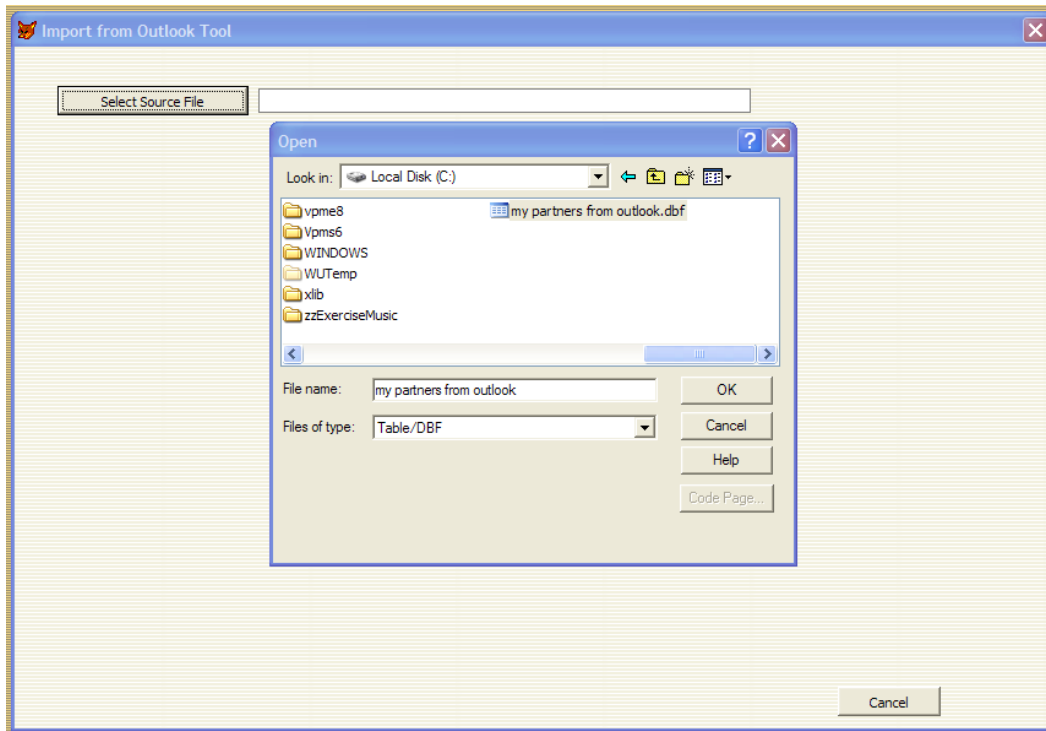


Outlook will give one final notice of what it intends to do, and will ask for your confirmation:

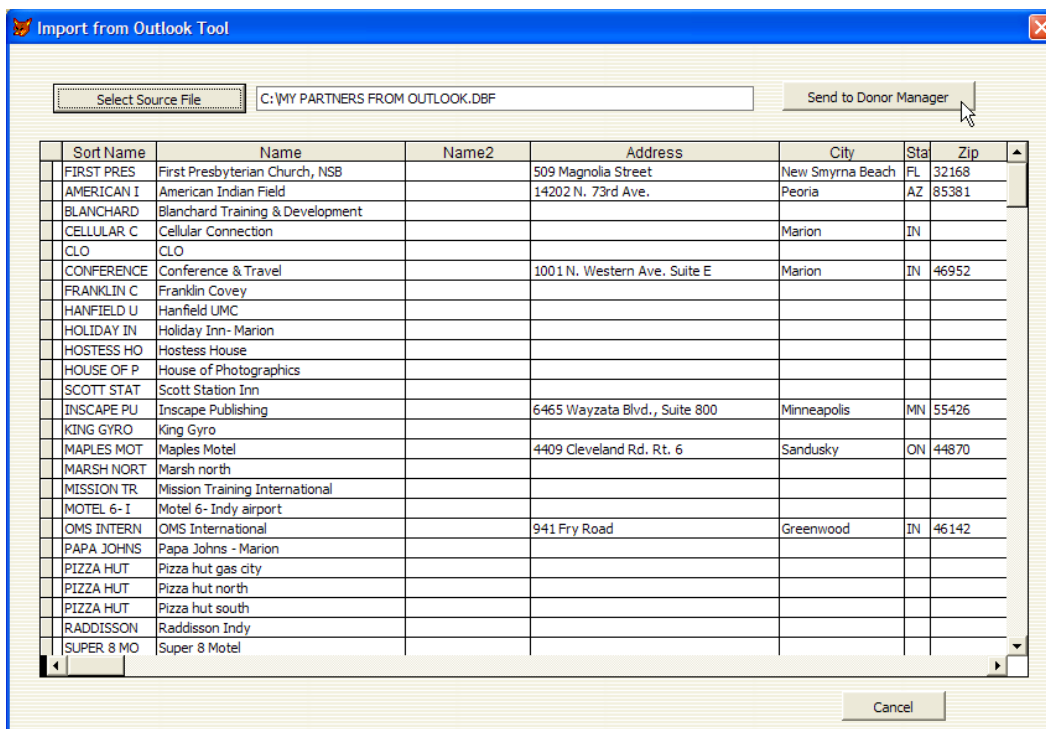


Once you have completed the export from Outlook to the FoxPro file, start the Donor Manager and choose /Tools /Import /Import from Outlook. This will start the Outlook Import Tool.

The first step here is to select the file you just exported from Outlook as the source file for this import:



The Donor Manager will open the data file and show you a preview of what it intends to import:



After you have reviewed this list, simply click “Send to Donor Manager” to finish the import of the names that came from Outlook into the Donor Manager.