



January 1, 2010

Dear Nonprofit Organization,

Thank you for expressing an interest in Donation Director. Our software is designed to make tracking donors and reaching fundraising goals easy without sacrificing important features and limiting powerful donor management tools. We work hard to make sure our nonprofit clients get the full value and use out of our software. Donation Director is designed to facilitate fundraising efforts, not get in the way of them.

What's included in Donation Director:*

| | |
|---|-------------|
| Donation Director Software..... | Inc. |
| Remote Program Installation & Training | Inc. |
| The first full year of Support & Maintenance..... | <u>Inc.</u> |

What's included in Yearly Support & Maintenance:

| | |
|---|-------------|
| Unlimited, Toll Free Technical Support (with a real person)..... | Inc. |
| Product Updates & Upgrades..... | Inc. |
| Additional Training of Staff (as needed) | Inc. |
| Consultation of how to best use Donation Director for your office | <u>Inc.</u> |

The first year of support & maintenance is included in the initial purchase price of Donation Director. After the first year, continued support is optional and may be renewed annually by paying a Yearly Support & Maintenance Fee.

Donation Director Pricing:*

| | |
|-------------------------------------|--|
| Single PC Installation | \$1,599.00 |
| Multi-PC Installation (up to 5 PCs) | \$1,999.00 |
| Each additional PC License | \$150.00 |
| Two Year Purchase Plan | <u>See supplementary pricing for details</u> |

*Prices good through December 31, 2010. Payment is required before we begin conversion or schedule installation and training. The first year of included support begins on the day Donation Director is installed.



Optional Module Pricing:*

| | |
|---|----------|
| Accounting Interface (Currently only QuickBooks® is supported.) | \$300.00 |
| Smart Import Routine | \$300.00 |
| Credit Card Processing | \$200.00 |
| Multiple Database Module | \$500.00 |

Yearly Support & Maintenance (after first year):*

| | |
|-------------------------------------|--------------|
| Single PC Installation | \$399.00/yr |
| Multi-PC Installation (up to 5 PCs) | \$549.00/yr |
| Each additional PC License | +\$50.00/yr |
| Accounting Interface | +\$50.00/yr |
| Smart Import Routine | +\$50.00/yr |
| Credit Card Processing | Included |
| Multiple Database Module | +\$150.00/yr |

Data Conversion:

| | |
|---|-----------------|
| Basic Data Conversion from our Excel Import Spreadsheet | Free |
| Standard Database Conversion including transactions* | \$1,000.00 est. |

The free conversion works well for organizations that have smaller quantities of donors and have not kept detailed transaction records. Also, keying in transactions is a relatively quick process and with smaller numbers of transactions, the free conversion becomes a more affordable option.

The paid conversion is a common choice among nonprofits that have used donor management or database software and want their historical information transferred. It is also beneficial to organizations that have kept high quality spreadsheets with donor information and giving history.

Free Conversion:

The first option is free and includes the import of a list of donor contact information and some identifying traits and demographic information. We provide the nonprofit a spreadsheet with descriptions of the fields available and instruction on how information must be laid out within the spreadsheet. The nonprofit then organizes their donor information in the requested format while cleaning up their data and eliminating duplicate records. This free conversion does not include transaction information.

*Prices good through December 31, 2010. Payment is required before we begin conversion or schedule installation and training. The first year of included support begins on the day Donation Director is installed. QuickBooks is a registered trademark and service mark of Intuit Inc. in the United States and other countries.



Not setting aside time to complete this conversion can significantly delay training and implementation of Donation Director. It is difficult to estimate the time necessary for organizing a conversion because every nonprofit's data ranges from requiring a lot of clean up to being in perfect order. We usually estimate two weeks of the nonprofit working an hour or two a day on their data. Depending on the condition of the data, the number of donor records involved, and the availability of time to devote to this process, this could take significantly longer.

Paid Conversion:

The second import option available is a paid conversion. This involves transferring the data to us for our programmers to import. We will import from other fundraising database systems or from excel spreadsheets. Our paid import includes importing transaction information. We generally charge a fee of \$1,000.00 to import information this way. This fee is sometimes greater depending on the complexity of the import. This process still requires some effort by the nonprofit while we work with their data. We transfer the data back to the client a few times during the process to resolve issues and to make sure their data is being imported correctly. This process also generally takes about two weeks to complete.

Training:

Installation and training are included with the purchase of Donation Director. Trainings are usually broken down into three or four, two hour sessions. Training sessions are performed using a remote internet connection with the support person on speakerphone. Each session introduces the user to a new portion of the application. Sessions are scheduled a few days apart to allow the user time for "homework" to apply concepts learned in the previous session and to prepare for the following session. Generally, training lasts for two weeks, but can take additional time depending on whether the user attends trainings as scheduled, needs additional help, or is interrupted during sessions. We find that if the user is actively participating, on time, and actively utilizes information learned between trainings, three two hours sessions is effective. However, we do not limit the number of trainings necessary and we do not charge for missed trainings. More than one staff member may attend trainings. The conversion must be complete before training can be scheduled.

Training overview:

- Session 1: Installation, General Program Overview, System Setup, Q & A.
- Session 2: Account Manager, Appeal Manager, & Letter Templates
- Session 3: Transaction Wizard, Correspondence Wizard, & Task Manager
- Session 4: Reports – In detail.

*Estimate of client labor hours necessary for installation of Donation Director and training:

Initial conversion:

| | |
|--|-------------|
| Free conversion for most organizations | 15 hours |
| Data entry after free conversion | 10 hours |
| Paid Conversion | 3 hours |



| | |
|----------------------------|-----------|
| Installation | 1-2 hours |
| Training | 8 hours |
| Homework between trainings | 9 hours |

Additional hours will be necessary on a monthly basis for keying in transactions and new donors, setting up appeals, and generating reports, thank you letters, and other forms of correspondence. However, once fundraising software is in place, many of these things take far less time than they did without software.

Also, if no conversion is necessary, installation and training can begin as soon as the nonprofit is ready. Data entry time may still need to be budgeted for keying in donors and recent transactions.

Generally a nonprofit can be up and running with Donation Director in 30 days, as long as they budget the time for the conversion, installation, training, and data entry.

Reporting:

Numerous reports are included with Donation Director. In addition to the various provided reports, Donation Director provides a powerful custom report building utility. This utility allows for the creation of a virtually limitless number of custom reports centered on the information each individual client requires.

Some Things to Think About:

Choosing the correct donor management software package is a decision that can have a significant impact on the future of a nonprofit organization and should be carefully researched. We have a live online demonstration that we do with each nonprofit interested in Donation Director. This allows us to discover any issues that may come up with a particular organization's installation as well as giving the nonprofit an opportunity to see exactly how Donation Director integrates into their fundraising activities. If you haven't had the opportunity yet to sit through our demonstration, please take the time to do so. We want all of our partners to be as successful as possible and will do all we can to make sure our software facilitates that success. You can obtain additional information about Donation Director via our web site: <http://www.donationdirector.com/>

Thank you for considering Donation Director.

Sincerely,

A handwritten signature in black ink, appearing to read "Greg Bergquist". The signature is fluid and cursive.

Greg Bergquist
Cascade Data Solutions



Supplementary Pricing - Two Year Purchase Plan!

Cascade Data Solutions is offering a Two Year Purchase Plan. This is being offered to help make acquiring software more affordable. There are no fees or finance charges associated with this promotion.

Here's how it works:

Our Two Year Purchase Plan takes the purchase price of Donation Director and the second year's annual support & maintenance fee and adds them together. This amount is then divided in half, to be paid in two installments. The first payment is due before installation of Donation Director and the second equal payment is due one year from the date of installation. After this two year period, if you have valued our support and want to continue with us, our normal support costs for the next year would apply, e.g. annual support for a Single-PC License is \$399/yr, and a Multi-PC License is \$549/yr.

Currently, assuming no conversion costs, no extra modules, and no extra PC licenses, here is how the two year plan would look with our two basic versions of Donation Director.

Our Single-PC License would break down into two equal annual payments of.....\$999.00*
(Single-PC License fee of \$1,599.00 plus \$399.00 for the second year's support.)

Our Multi-PC License would break down into two equal payments of.....\$1,274.00*
(Multi-PC License fee of \$1,999.00 plus \$549.00 for the second year's support.)

This includes the initial purchase of Donation Director along with two years worth of consultative support. Support includes any training required for current or new employees, phone support Monday through Friday from 7am to 3:30pm Pacific Time, all software updates released during that two year period, and consultative services on how best to use Donation Director's functions to maximize it's value to the nonprofit. Additional modules are not included in updates and, if their functionality is needed, must be purchased separately. Available additional modules are listed on our standard pricing page. Conversions of existing data that include transactions, require extensive manipulation of the nonprofit's data, or require pulling information from another database application will incur an additional charge. (See Data Conversion)

*Prices good through December 31, 2010. The first payment is required before we begin conversion or schedule installation and training. The first year of included support begins on the day Donation Director is installed.



Donation Director Optional Modules

Donation Director's optional modules are purchased separately from the main application and have their own support costs. We separate these modules from Donation Director because in many cases they are not needed by all of our clients and it allows us to make Donation Director more affordable.

Donation Director Accounting Interface:*

Simplicity is the key feature of the Accounting Interface. Currently the only accounting software supported is QuickBooks®.

All transactions that are keyed into Donation Director can potentially be imported into QuickBooks. This includes new transactions, adjustments, and write-offs. What you will see in QuickBooks are journal entries that are associated with a customer named Donation Director.

After purchasing the Accounting Interface, a Cascade Data Solutions support specialist will assist you in the initial setup. This process involves connecting the Accounting Interface with QuickBooks, matching up the Donation Director chart of accounts with your QuickBooks chart of accounts, assigning your QuickBooks chart of accounts to your appeal categories and/or designations and if necessary, assigning classes.

The Accounting Interface allows for a high degree of flexibility. Importing is as simple as specifying a transaction date range, a batch date range or a batch number. You can review the transactions that are pulled up prior to actually importing them into QuickBooks. You can also make simple changes to which chart of account item or class the transaction is to be assigned. Checks and cash can be assigned to un-deposited funds for deposits through QuickBooks. Or, if you don't use un-deposited funds, we have a deposit slip report which will match the transactions you assign to your bank account.

After the fact, you can stay in sync by running the Post Import Report. This report compares your import log with the transaction information in Donation Director and QuickBooks. Any exceptions would indicate that something was changed in one location but not the other.

Requirements for the Accounting Interface are as follows:

- The [system requirements](#) are the same as Donation Director's.
- The Accounting Interface must have access to the Donation Director Data file, either on the same PC or over a network.
- The Accounting Interface must be installed on the same PC as QuickBooks.
- For best performance, have QuickBooks running with the correct company file open.

*QuickBooks is a registered trademark and service mark of Intuit Inc. in the United States and other countries. Donation Director's Accounting Interface is designed for use with the 2005-2010 versions of either QuickBooks Pro or QuickBooks Premier only.



Smart Import Routine:

Our smart import routine is designed to import donor account information as well as donor transactions from sources outside of Donation Director. The routine allows for careful review of the information being imported, minimizing the creation of duplicate records.

Automatic Credit Card Processing:

Donation Director now supports automatic credit card processing! We have teamed up with X-Charge to provide our clients with an affordable option to process credit card donations. All it takes is purchasing the optional Credit Card Processing Module for Donation Director and setting up a merchant account through [X-Charge](#). We chose X-Charge because their credit card processing fees were the lowest of those we looked at and they also allowed us to integrate their system as closely as possible with Donation Director. This integration makes processing credit cards easy and very secure.

In addition to simply keying in credit card donations and processing them on the spot, you can also set up a pledge from a donor to automatically bill their credit card on their payment billing schedule. This keeps you from having to manage mailing out reminders when payments are due (or past due) or from having to manually charge a credit card using a card processing machine. Also, you limit your liability as there is no reason to keep credit cards numbers on file. The Credit Card Processing Module can keep card numbers stored for you on the remote X-Charge servers. X-Charge meets the Payment Card Industry Data Security Standard or PCI DSS. Only an alias of the donor's card number and the last 4 digits are stored in the Donation Director database. This makes your donor's credit card information as secure as possible.

For more information about PCI DSS certification and credit card security please visit:

<https://www.pcisecuritystandards.org/>.

X-Charge also supports a full range of credit card processing options. If you need to process credit cards outside of Donation Director, X-Charge will work for that too, and very likely save you money over your current credit card processing provider.

Multiple Database Module:

Our Multiple Database Module allows for more than one nonprofit's donors to be stored in Donation Director. Each nonprofit's records are completely separated from the others and each are protected with individual user login IDs and passwords. Two or more nonprofits could conceivably share a single Donation Director installation using this module.



A Little about Us!

Cascade Data Solutions is an independent consulting and custom software development firm founded in 1991, located in Albany, Oregon. We specialize in the creation of innovative, cost-effective solutions designed to meet the specific needs of the United Way and other Nonprofits.

In 1998 we designed a campaign management software package called Donation Tracker. Donation Tracker was originally created as the result of the Benton County United Way office in Corvallis, Oregon being frustrated with their existing Campaign Management Software. They convinced us of the need for United Way specific software with specific features unique to how United Way does business, and even more importantly, its need to be strongly supported. In 1999, we took Donation Tracker to four other beta sites before selling it nationwide. Donation Tracker has been widely accepted and is used in 43 states by over 360 United Way offices.

Donation Director followed Donation Tracker in 2005. Because of frequent requests from United Way affiliated agencies to purchase Donation Tracker, Cascade Data Solutions decided to follow this same model for creating specific donor management / fundraising software for small to medium sized nonprofit organizations. We believe that currently the software options available in the nonprofit arena do not properly support the needs of smaller nonprofits. Many applications have either been simplified to the point they are missing important features, are way to complex to be understood by various staff members, or are far too expensive. Donation Director meets the needs of smaller nonprofits by offering a powerful set of donor and fundraising management tools without burying them under needless levels of complexity and irrelevant features. The cost of our software along with our annual support program is designed to allow nonprofits to budget properly and guarantee that they always have the necessary support available to them.



Donation Director System Requirements:

Microsoft Windows 2000, Windows NT version 4.0+, Windows XP, Windows Vista, or Windows 7
(*We do not support Windows 95 or 98)

Microsoft Word 2003 (Microsoft Office 2003+ recommended)

Minimum free hard drive space: 200 MB (+500 MB recommended)

Minimum display resolution: 800X600 (1024x768 or higher recommended)

128 MB RAM minimum (256+ MB recommended) Windows NT, Windows 2000
256 MB RAM minimum (512+ MB recommended) Windows XP
1024 MB RAM minimum (2048+ MB recommended) Windows Vista, Windows 7

Intel Pentium III class or higher recommended
(All current Intel & AMD Processors will run Donation Director.)

56K modem minimum (Cable/DSL or other high speed internet connection recommended)

There is no need for a specific type of network or file server to run Donation Director. Donation Director will work on a standalone computer, a “peer to peer” network, or Windows Server, etc.

Remote access to your PCs for support, training, and installation will significantly improve our ability to support Donation Director. If remote access is not available we will do our best to provide quality support, however, some issues may take longer to resolve. Also some situations may require the transfer of your donor database to our server for testing. All donor information is held securely and used solely for testing and issue resolution.

If you have any questions, or would like a more detailed discussion on this listing, please call us at 800-280-2090.



Manage your fundraising & donor relationships
with software designed specifically
for smaller nonprofits.

Cascade Data Solutions cares about our clients and the positive way our software affects their ability to further their passion for philanthropy. When you purchase software from us it's more than just buying a product. You are joining us in a relationship where our goal is to help you utilize our software to its fullest potential and subsequently maximize your fundraising success.

A quality fundraising software application should allow users the utmost flexibility in working with their data and yet should not require the skills of a programmer. Donation Director offers a robust set of donor and fundraising management tools without burying them under needless levels of complexity and irrelevant features.

Our goal from the very beginning was to create a powerful fundraising application that caters to the needs of smaller nonprofits. Cascade Data Solutions, together with various smaller fundraising organizations, has created in Donation Director a software application and support system that is ideal for small to medium size nonprofits.

In fact, our development process continues as we regularly adjust and improve Donation Director to meet the needs of our current and future partners.

Call us today for a live demonstration of Donation Director!

Sincerely,

Donald Bayne III
President





- Donations may be allocated towards one or more appeals on a single transaction
- Distinguish between acknowledged amount and accounts receivable amount for pledges
- Distinguish between acknowledged, received, and tax receipt amounts to properly credit in-kind gifts
- Reminder schedule for each pledge entry can be customized
- Customizable transaction fields for added flexibility
- Soft Credits are supported
- Add/Edit accounts without switching to Account Manager
- Designate restricted gifts
- Optional module for credit card processing

Batch No: 30 **Batch Date: 1/12/2009** **Contr'l No: Annual Gala** **Fiscal Year: 2008** **ID# (New)**

Step #3 - Enter Transaction Information

Donation Type: **Check** Anonymous Gift: Short Note: Custom Fields | Memo

Received On: 1/12/2009 Counts As: 1

Acknowledged Amt.: \$1,000.00

Received Amt.: \$1,000.00

Tax Value: \$1,000.00 Tax Receipt Method: Annual Tax Receipt

Chk No# / Chk Date: 6541 / 1/11/2009

Transaction Solicitor: Almgran, Diana Dedication: Bob Gates

Step #4 - Enter Appeal Source and Designation

Appeal Name: Spring Auction New Appeal: Soft Credit Amt.: 0.00 **SC**

Appeal Category: Table Sponsor Delete Appeal:

Appeal Ack. Amt.: \$1,000.00 Appeal Tax Value: \$1,000.00 Designation: Scholarships

Appeal Recvd Amt.: \$1,000.00 Category Count: 0 Acknowledge: Auction Doc

| Appeal Name | Ack. Amt | Recvd. Amt | Tax Value | Send | Acknowledgement Letter |
|-------------------------------|-------------------|-------------------|-------------------|-------------------------------------|------------------------|
| Spring Auction - Table Sponso | \$1,000.00 | \$1,000.00 | \$1,000.00 | <input checked="" type="checkbox"/> | Auction Doc |
| Total | \$1,000.00 | \$1,000.00 | \$1,000.00 | <input type="checkbox"/> | |

Buttons: Link, Close, Previous, Save/Next



- Pledge reminders are automatically added to letters needing to be sent
- Thank you letters, Pledge reminders, and Tax receipts are automatically created using custom letter templates (Requires Microsoft Word)
- Correspondence may be emailed as well. (Requires Microsoft Outlook)
- Correspondence activity is automatically recorded for each account

Acknowledgements Select All: Select None: View Printed Acknowledgements:

Acknowledgements To Print: Acknowledgements To Email:

| Printed | Account Name/Letter Name | Mailing Address/Appeal | Acknowl. Amt. | Trans. Date | Tran |
|--------------------------|--------------------------|------------------------------|---------------|-------------|-------|
| <input type="checkbox"/> | Bayne, Don | 3410 Tadena SW - Three Hills | \$1,000.00 | 1/9/2009 | Dona |
| <input type="checkbox"/> | Golf Thank You Doc | Swing for Kids-Hole Sponsor | | | Dona |
| <input type="checkbox"/> | In Kind Donations.Doc | Poker Tournament-General C | | | Dona |
| <input type="checkbox"/> | Earl, Lyle | 406 NW 8th - Three Hills, NE | \$2,000.00 | 1/9/2009 | Pledg |
| <input type="checkbox"/> | Golf Thank You Doc | Swing for Kids-General Gift | | | Pledg |
| <input type="checkbox"/> | Ringer, Jerry | 12325 SW 106th Dr. - Three H | \$1,000.00 | 1/9/2009 | Dona |
| <input type="checkbox"/> | Golf Thank You Doc | Swing for Kids-General Gift | | | Dona |

Buttons: Previous, Status, Mail Merge, Delete, Edit, Close



- Utilize various advanced search functions
- Mass assign functions for data updates
- Automatically maintain a log of all communications and account activity for each account
- View donor information including, general information, transactions, activities, giving, important dates, account solicitor, demography, and more
- Assign unlimited lists of special characteristics to each donor (for filtering, sorting, and reporting)

Account Type Individual Business Fund Account Inactive Date: Record Information

Title: First Name: Don MI: Last Name: Bayne Account No.:

Acknowledge As: The Bayne Family Preferred Correspondence: Mail Chart of Account: Individual Support

General | Address/Phone | Relationships | Personal Info. | Giving Summary | Transactions | Activities | Demography | Docs/URLs

Web Site: www.cascadeds.com Primary Account Solicitor: Almgran, Diana

Source: Direct Mailer Secondary Account Solicitor: Clark, Ronald

Employer: Cascade Data Solutions Occupation: Software Support Gender: Male

Misc. Notes: Important Dates Custom Fields

| Date Type | Date | Notes |
|-------------|-----------|------------------|
| Birthday | 6/26/1961 | |
| Anniversary | 1/8/1982 | |
| Graduation | 6/5/2006 | Ariana Graduates |

| Account Attributes | Value |
|-------------------------------|-------------------------------------|
| Show As Anonymous | <input type="checkbox"/> |
| Allows Solicitation | <input checked="" type="checkbox"/> |
| Do Not Acknowledge | <input type="checkbox"/> |
| Do Not Show on Rollup Reports | <input type="checkbox"/> |
| Do Not Include in Mailings | <input type="checkbox"/> |
| Is an Account Solicitor | <input checked="" type="checkbox"/> |
| Task Assignee | <input checked="" type="checkbox"/> |
| Capital Campaign Prospect | <input checked="" type="checkbox"/> |
| Holiday Card | <input type="checkbox"/> |
| Newsletter | <input checked="" type="checkbox"/> |



Appeal Manager

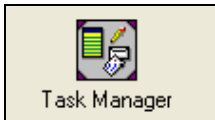
- Unlimited number of appeals and appeal categories
- Map each appeal category to your chart of accounts
- Assign a goal and expense figure to each appeal
- Assign a contact person, phone, pledge response letter and payment response letter to each appeal

Appeal Information
Name: Spring Auction Inactive Date: [calendar icon]

Appeal Yearly Information | Appeal Category Information

| Appeal Category | Chart of Account | Class | Default | Inactive |
|-------------------|------------------|-------|-------------------------------------|----------|
| Donated Items | Spring Auction | | <input type="checkbox"/> | |
| General Donations | Spring Auction | | <input checked="" type="checkbox"/> | |
| Live Auction | Spring Auction | | <input type="checkbox"/> | |
| Major Sponsor | Spring Auction | | <input type="checkbox"/> | |
| Silent Auction | Spring Auction | | <input type="checkbox"/> | |
| Table Sponsor | Spring Auction | | <input type="checkbox"/> | |
| Ticket Sales | Spring Auction | | <input type="checkbox"/> | |

| Fiscal Year | Goal | Expenses | Inactive |
|-------------|-------------|------------|----------|
| 2005 | \$30,000.00 | \$5,000.00 | |
| 2006 | \$40,000.00 | \$6,000.00 | |
| 2008 | \$50,000.00 | \$7,000.00 | |



Task Manager

- Easily prioritize your fundraising activities
- Attach tasks to individual donors.
- Associate individual tasks with specific appeals
- Tasks are color coded by due date
- Create and print tasks for board members
- Task reminders are displayed on the main screen

| Subject | Account Name | Task Status | Assigned To | Start Date | Due Date | Completed | As |
|------------------------------------|----------------------|-------------|-------------|------------|-----------|-----------|-----|
| Send cards to Alumni re: Fall Gal | | Not Started | | 12/1/2008 | 12/1/2008 | | As |
| Set up Golf Tournament | Bayne, Don | | | | | | De |
| Fun Run Permits | | | | | | | Fu |
| Get Fall newsletter out to printer | | | | | | | Fal |
| Fall Gala Ticket Sales | | | | | | | De |
| Sponsorship for Golf Tournament | Cascade Data Solutio | | | | | | Ca |
| Call Sponsors for Spring Auction | Houser, Tina | | | | | | Sp |
| Next Action For Bachelor, Gilbert | Bachelor, Gilbert | | | | | | Ca |
| Order One Campaign Materials | | | | | | | Ca |
| Phone Call | Bayne, Don | | | | | | Sp |
| 2009 Auction | Berry, Pauline | | | | | | Alt |
| Summer Hoop Jam | Berlowitz, Norman | | | | | | Ca |
| One Campaign Follow Up | Batcheller, Ralph | | | | | | Ca |
| One Campaign Follow Up | Barken, Cecil | | | | | | Ca |
| One Campaign Follow Up | Ashton, Bill | | | | | | Ca |
| Call regarding Hoop Jam | Bayne, Don | | | | | | |
| Schedule next meeting | Bayne, Don | | | | | | |

Task Search

Account Name: [dropdown]

Task Subject: [text]

Task Status: [dropdown: Not Started]

Task Created By: [dropdown: Diana]

Task Assigned To: [dropdown]

Associated Fiscal Year: [dropdown: 2009]

Associated Appeal: [dropdown: Spring Auction]

Start Date Range: [calendar] through [calendar]

Due Date Range: [calendar] through [calendar]

Completed Date Range: [calendar] through [calendar]

Note: Clicking the [Search] button with no criteria selected will bring up ALL previously entered tasks.

Clear [X] Close [OK] Search [Search]



Reports

- Custom report builder - design your own custom reports! (Custom reports include general reports, a clean Excel export, mailing labels, bulk emails, and solicitation letters)
- Pre-existing reports including: Account Fact Sheets, Activity Reports, Solicitor Productivity Reports, Accounts Receivable Reports, Appeal Performance Reports, Mailing Labels, Batch Reports, and Transaction Listings
- Reports can be printed, exported (PDF, Excel, or HTML), or e-mailed

Reports

| Report Title | Description | Report Code |
|---------------------------------------|---------------------------------|-------------|
| My Favorites | | |
| [-] Account Reports | | |
| Account Fact Sheet | Prints all account information | |
| Activity Reports | Prints various activity logs by | |
| [-] Financial Reports | | |
| Account Solicitor Productivity Report | Prints the Account Solicitor P | |
| Accounts Receivable Reports | Prints the AR, Past Due, Billin | |
| Appeal/Campaign Reports | Prints the Fact Sheet, Campa | |
| Batch Report | Prints Batch Reports for a se | |
| Combined Giving Report | Prints Roll Up and Soft Credit | |
| Range of Giving Report | Prints the Range of Giving Re | |
| Transaction Listing Reports | Prints the Payment Listing, Gi | |

Report Builder: (Version 2.0.39)

Select Report

| Report Name | Description |
|---------------------------------------|-------------------------------|
| 05 - 07 Giving | Raised over last three years |
| Account Solicitors | Account Solicitors |
| Board Members | Board Members |
| Consistent Givers Over Last Five Year | Donors who gave every year |
| Givers 2005 | Individuals - Raised .01-Max |
| In Kind Donations | Spring Auction Donations 08 |
| LYBUNT - Listing of lapsed donors | Listing of lapsed donors. |
| Mailing Labels | Everyone in database, exclu |
| News Letters | Attribute/Newsletter - Active |
| Spring Auction Solicitation | Spring Auction Donors |
| SYBUNT - Some Year, But Not This - k | Listing of donors who have |

Delete [trash] Copy [copy] Edit [edit] Add [plus] Close [X] Run [play]



Main Screen

- Track Appeals, Events, Donors, Prospects, Staff, and Volunteers
- Track pledges, and donations
- Instant mail merges for Acknowledgments, Pledge reminders and IRS receipts
- Group accounts for emailing, reports, and correspondence
- Custom billing schedules, donation matching, easy exports, flexible reporting, and task management

Optional Modules

- Accounting Interface (Designed for use with QuickBooks®)*
- Smart Import Routine
- Automatic Credit Card Processing
- Multiple Database Module

Donation Director - designed and published by Cascade Data Solutions, providing innovative software solutions since 1991.

*QuickBooks is a registered trademark and service mark of Intuit Inc. in the United States and other countries. Donation Director's Accounting Interface is designed for use with the 2005-2010 versions of either QuickBooks Pro or QuickBooks Premier only.