



## Contents

Entering a Donation .....	2
Update to Master (U2M).....	2
Shared Donor Summary.....	3
Q-Xpress Fields.....	3
Benefits of Activity by Fiscal Year .....	3
Donor Recognition.....	3
Accumulated Donations by Fiscal Year.....	4
Committed Donors or Donor Tenure.....	4
Accumulated Donations by Date Range .....	5
Sample Q-Xpress Selection.....	5
Members with Donation Amounts Report .....	6
First Year Donors .....	6
New Donors by Receipt Date Range.....	6
Donor By First Year Donated.....	7
Donor By Last Year Donated.....	7
QuikEase .....	7
Finding individual Donations by Date and Amount .....	8
Receipting Amount Payment Method Date .....	8
Using the Breakout Codes .....	9
Receipting Breakout Amount Payment Method Date.....	9
Donor Retention Report.....	9



Q-Xpress \ Donor Selection \ Donor Retention ..... 10  
Closing..... 10

## Entering a Donation

A donation is received. How did it arrive? Is it the result of a campaign initiated by the charity or has it come due to the goodwill of a donor?

We discussed campaigns in our first seminar. Based on the campaigns which have been defined a donation is allocated at the request of the donor.

The donation is recorded by selecting the campaign and in some cases a designated fund. Where the fund is not designated, the gift is allocated to a general donation fund like greatest need.

Entry of the gift can tell a great deal as it identifies why the donor gave and possibly if the donor has a specific area of interest.

## Update to Master (U2M)

Once the donation is entered and determined to be correct, it can be posted or U2M. This process for a new donor identifies the first fiscal year they have donated. It will also update the last year donated.

If a donor has given in prior years the first year donated remains constant while the last year donated now displays the last fiscal year donated when U2M is run.

For each fiscal year the donor's record displays total dollars in each of the following categories:

- Registration is updated using the Registration Fee value
- Donations with a Donation Count
- Sponsorships
- Merchandise

## Seminar Series Topic II

### How @EASE Manages Donor Data



Participation

Registration

Participation is updated using the Acquired By's fundraising number and it accumulates the Amount field.

### **Shared Donor Summary**

Donors, both private and corporate can share a donor summary which means that all gifts are allocated to on Donor Summary set of totals. This can be useful for couples or couples with a private foundation or couples with a small business. There are utilities in @EASE to Join donors as well as Separate them. Where couples play different roles in an organization this is a good way to ensure their donation activity is recognized. The Private Donor Tutorial area has a full description of how this works.

### **Q-Xpress Fields**

Any time a record is selected using Q-Xpress, First and Last Year Donated are automatically included. Please remember the accuracy of these values are determined by U2M being completed. This offers valuable information for development staff.

### **Benefits of Activity by Fiscal Year**

Reviewing a donor's Donor Summary found in their Profile, shows by fiscal year what their accumulated activity has been providing all records have been U2M.

### **Donor Recognition**

Where campaigns have been well set up by Donation Type, running a Q-Xpress \ Donor Selection \ Donor by Campaign Year makes finding total giving easy to do.

When this selection is run the Amount field in Q-Xpress provides a grand total of the years selected, the Donation Count displays the gift count for the period.

In the Q-Xpress View window a global assign can be made for the different levels by first sorting by amount and then highlighting donors by gift amount and assigning a Donor Recognition value.

## Seminar Series Topic II

### How @EASE Manages Donor Data



### Accumulated Donations by Fiscal Year

A screenshot of a software interface titled "Q-Xpress Selection (Donor By Donation Amount by Year)". On the left is a navigation menu with options like "Private Donors", "Corporate Donors", "Receipt Selection", "Pledges", and "Donor Selection". The "Donor Selection" section is expanded, showing "Donor By Donation Amount by Year" as the selected option. The main panel shows "Current Record Count: 54" and a "My Records" dropdown. There are checkboxes for "Delete existing records from file", "Enable Suppress mail option", and "Enable Mailing Labels Count". An "Amount Range" section has "From: 1,000.00" and "To: 9,999,999.99". A "Donation Type" list includes "Donation Type", "TicketSales", "Donations" (checked), "Sponsorship", "Merchandise", and "Participation". "For Years" are set from "1900" to "2017". There are checkboxes for "Include donations not yet updated to master" (checked) and "Include Pledged". The "Donor Type" is set to "Both Private and Corporate".

Here we are looking for accumulated donations of \$1,000 or more from fiscal years 1900 through to the end of fiscal 2017. Where U2M is incomplete options are provided to include records not yet updated as well as future Pledged donations.

### Committed Donors or Donor Tenure

The Q-Xpress selection **Donor Selections\ Donor by Summary Year** lets you locate donors who have given in a dollar range over a specific number of years. The dollar range is finite which means if you are looking for donors who have given between 200 and 500 dollars over three years and they have given \$550.00 in any one of those years the record is not selected.

A screenshot of a software interface titled "Q-Xpress Selection (Donor Summary by Year)". The left navigation menu shows "Donor Summary By Year" as the selected option. The main panel shows "Current Record Count: 1" and a "My Records" dropdown. There are checkboxes for "Delete existing records from file", "Enable Suppress mail option", and "Enable Mailing Labels Count". An "Amount Range" section has "From: 200.00" and "To: 500.00". A "Donation Type" list includes "Donation Type", "TicketSales", "Donations" (checked), "Sponsorship", "Merchandise", and "Participation". "For Years" are set from "2013" to "2016". There are radio buttons for "Donated in all years" (selected) and "Donated in any 1 year(s)". There are links for "By Membership" and "By Quality". The "Donor Type" is set to "Private".

This report is selecting private donors who gave Donations in the fiscal year period of 2013 – 2016. To be included they must have given in all years and in a very specific range of \$200 - \$500.

Applying a Quality to all the selected data shown in Q-Xpress View gives the

opportunity to print the Members with Donation Amounts Report found under Donor Selections. A sample report is shown above.

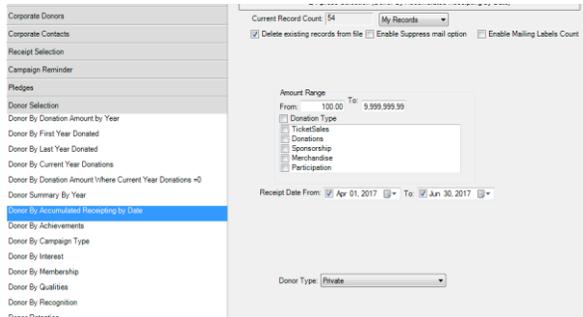


## Seminar Series Topic II

### How @EASE Manages Donor Data

Recognizing valued donors who have given over a long period can be as stroke to the inside rather than the ego. According to a US consulting group, donors who have given in 13 consecutive years are prime candidates for a planned gift.

### Accumulated Donations by Date Range



This selection is useful when looking for records with donation amounts that fall within a fiscal year. Records are selected from individual donation records and not Donor Summary records.

### Sample Q-Xpress Selection

This is a sample of donor records selected by Donor Selections \ Donor by Donation Amount by Year. The Amount field shows accumulated dollars, the Donation Count (count is cut off by the column width) shows the number of donations and then we have First and Last Year Donated. These columns have been frozen by right clicking on the column header. The can be sorted by one field by clicking the column header or by two fields using the Q-Xpress Sort option on the right side of the Q-Xpress View window.

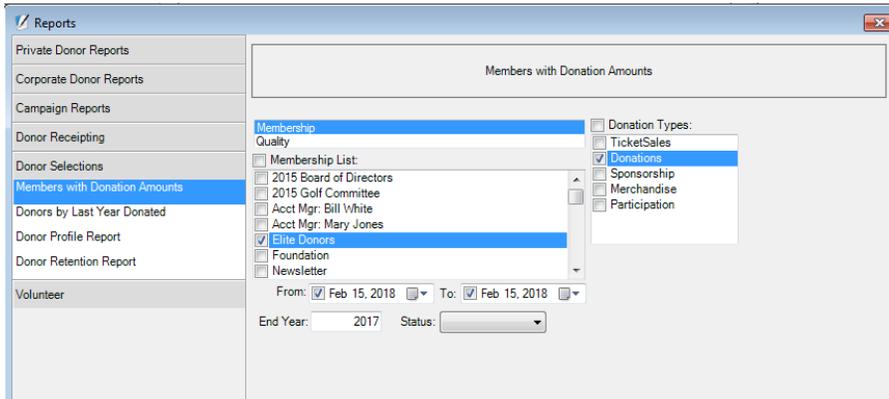
Q-Xpress View								
Type	Fundraising	Go To	Go To	Sort Field	Amount	Donation	First Year Donated	Last Year Donated
C	C007071			PT Testing	1,010.00	2	2015	2015
P	P000029			Billings Stuart	1,030.00	12	2002	2017
P	P000053			Moreau Luce	1,040.00	19	2002	2017
C	C003481			Buffalo House Bar	1,054.00	2	2005	2017
P	P000032			Thompson Gail	1,063.00	16	2001	2017
P	P000063			Wilson John & Mary	1,135.00	16	2010	2017
P	P000017			Miller Glenn	1,164.00	15	2002	2017
C	C003477			Edmonton Journal	1,280.00	2	2002	2017
C	C003474			Banff Trust	1,380.00	3	2002	2017
C	C001570			Michael's	1,470.00	7	2004	2017
C	C001812			ABC Resources	1,510.00	6	2001	2015
C	C007064			Norland Oil	1,510.00	2	2014	2015
C	C007065			City of Red Lake	1,510.00	2	2014	2015
P	P000006			Crombie Kelly	1,530.00	32	2001	2017
C	C001876			Shannon's Welding	1,540.00	8	2001	2012
C	C007062			New Company	1,540.00	3	2013	2015
P	P000061			Philpott Ann M.	1,580.00	23	2015	2017
P	P000080			Wikjord Alfred and	1,635.00	16	2010	2017
C	C002174			RBC & Associates	1,685.00	8	2001	2015
P	P000031			Adams Peter	1,695.00	10	2002	2017
C	C002896			Mac's Trucking	1,700.00	6	2002	2015
P	P000057			Brightmann Ludwig	2,080.00	67	2001	2017
P	P000007			Lutz Mike	2,416.00	39	2004	2017
P	P000064			Balken Bob & Joan	2,780.00	65	2010	2017

Seminar Series Topic II  
 How @EASE Manages Donor Data



### Members with Donation Amounts Report

This report can be printed using a Quality assigned to a group of donor records or a Membership with a specific Date Assigned value.



### Members with Donation Amounts Report

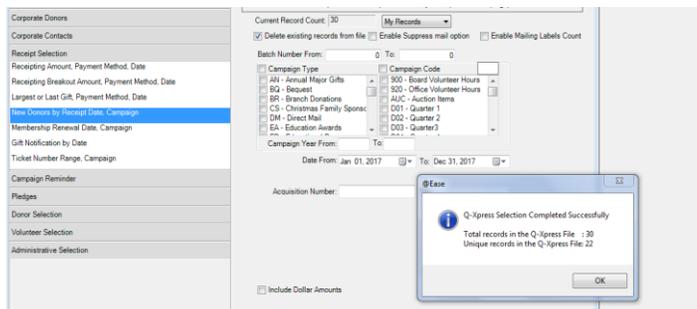
memberships Elite Donors  
 Date Range and Between Feb 15 2018 and Feb 15 2018 23:59:59  
 Donation Type = Donations

Donor No	Donor Name	Status	2017	2016	2015	2014	2013	Total	Average						
P000004	Abbott Kelly	Active	103	4	100	1	1,015	11	1,300	1	350	5	2,868	22	130
C001812	ABCResources Ltd.	Active					110	2					110	2	55
P000031	Adams Peter	Active	100	1			370	4					470	5	94
P000013	Anderson Peter & Karen	Active	350	8	300	12	1,515	17	300	12	650	16	3,115	65	48
P000064	Balken Bob & Joan	Active	310	7	420	12	930	14	420	12	420	12	2,500	57	44
C003474	Banff Trust Corporation	Active	600	1									600	1	600
C003482	Batsch Group Inc	Active					3,110	4					3,110	4	778
P000058	Batsch Sharon	Active	331	10	150	3	1,755	19			90	3	2,326	35	66
P000005	Bell Robert	Active	326	3	2,001	11	915	15	470	10	500	5	4,212	44	96
P000029	Billings Stuart	Active	100	1			235	3					335	4	84
P000057	Brightmann Ludwig	Active	250	7	300	12	300	12	300	12	300	12	1,460	65	26
C007065	City of Red Lake	Active					1,510	2					1,510	2	755
C007078	Comedy Central Foundation	Active	25,000	1	100,000	4							125,000	5	25,000
P000006	Crombie Kelly	Active	75	1			50	3	50	1	525	2	700	7	100

The total shown is only for the period reported. When donations are requested in the report a donation could be given along with an Average Gift.

### First Year Donors

### New Donors by Receipt Date Range



These reports sometimes offer conflicting values as their selection process is different. In this selection we have donors who first gave but gave more than once. The unique count of 22 identifies donors who have given for the first time

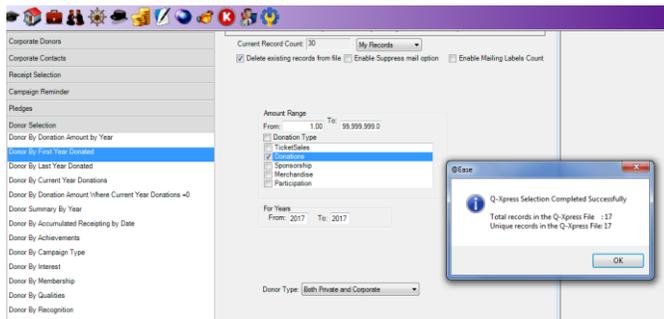
## Seminar Series Topic II

### How @EASE Manages Donor Data



but may have been on the database for some time. An example could be a significant other couple where one partner began giving in 2015 and the other partner gave for the first time in the date range shown. This was the case in the selection we had along with two new records which had not First Year value as their records were not yet U2M.

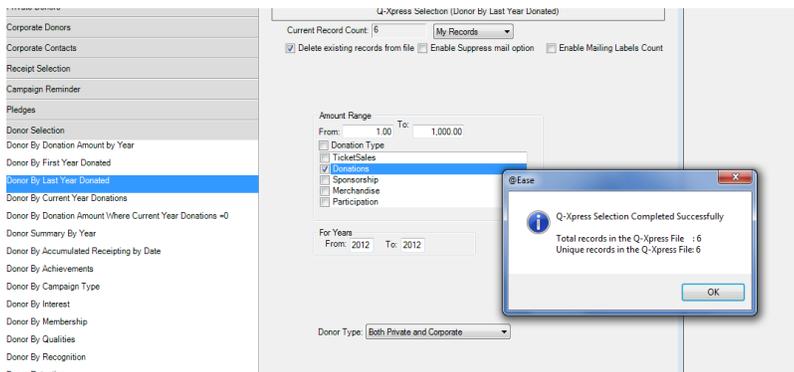
### Donor By First Year Donated



This selection uses the First Year Donated field.

The Amount and Donation Count for the Fiscal Year range along with First and Last Year donated are displayed in the Q-Xpress View.

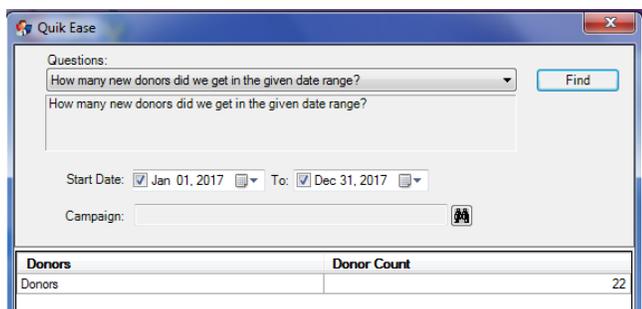
### Donor By Last Year Donated



The Amount and Donation Count for the Fiscal Year range along with First and Last Year donated are displayed in the Q-Xpress View.

## QuikEase

How many gifts did we receive in a Given Date Range?



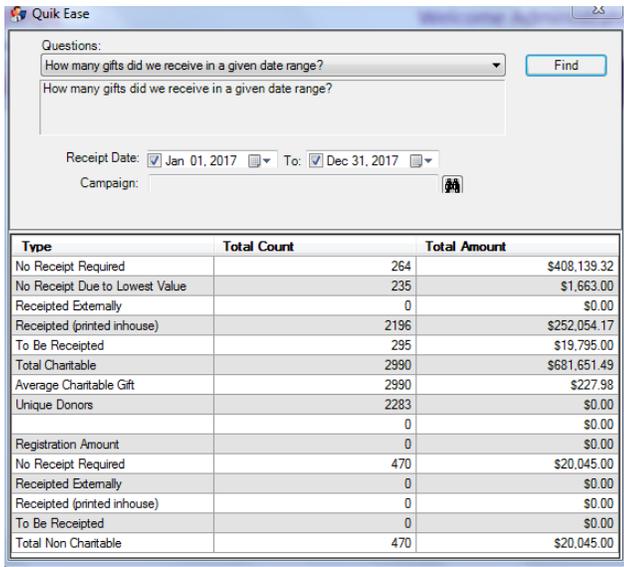
The same explanation applies as to New Donors by Receipt Date Range above.

## Seminar Series Topic II

### How @EASE Manages Donor Data



How many gifts did we receive in a given date range?



Questions:  
How many gifts did we receive in a given date range?  
How many gifts did we receive in a given date range?

Receipt Date:  Jan 01, 2017 To:  Dec 31, 2017

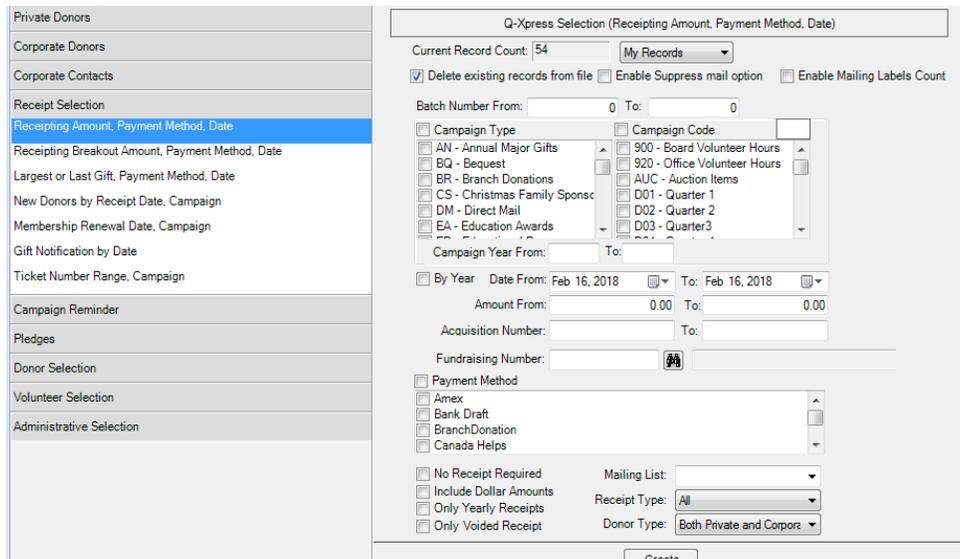
Campaign:

Type	Total Count	Total Amount
No Receipt Required	264	\$408,139.32
No Receipt Due to Lowest Value	235	\$1,663.00
Received Externally	0	\$0.00
Received (printed inhouse)	2196	\$252,054.17
To Be Received	295	\$19,795.00
Total Charitable	2990	\$681,651.49
Average Charitable Gift	2990	\$227.98
Unique Donors	2283	\$0.00
Registration Amount	0	\$0.00
No Receipt Required	470	\$20,045.00
Received Externally	0	\$0.00
Received (printed inhouse)	0	\$0.00
To Be Received	0	\$0.00
Total Non Charitable	470	\$20,045.00

This is a powerful request as it shows information on all levels of receipting, total gifts, total donors with a unique donor count and average gift.

## Finding individual Donations by Date and Amount

### Receipting Amount Payment Method Date



Private Donors  
Corporate Donors  
Corporate Contacts  
Receipt Selection  
**Receipting Amount, Payment Method, Date**  
Receipting Breakout Amount, Payment Method, Date  
Largest or Last Gift, Payment Method, Date  
New Donors by Receipt Date, Campaign  
Membership Renewal Date, Campaign  
Gift Notification by Date  
Ticket Number Range, Campaign  
Campaign Reminder  
Pledges  
Donor Selection  
Volunteer Selection  
Administrative Selection

G-Xpress Selection (Receipting Amount, Payment Method, Date)

Current Record Count: 54 My Records

Delete existing records from file  Enable Suppress mail option  Enable Mailing Labels Count

Batch Number From: 0 To: 0

Campaign Type  Campaign Code

AN - Annual Major Gifts  900 - Board Volunteer Hours

BQ - Bequest  920 - Office Volunteer Hours

BR - Branch Donations  AUC - Auction Items

CS - Christmas Family Spons:  D01 - Quarter 1

DM - Direct Mail  D02 - Quarter 2

EA - Education Awards  D03 - Quarter 3

Campaign Year From: To:

By Year Date From: Feb 16, 2018 To: Feb 16, 2018

Amount From: 0.00 To: 0.00

Acquisition Number: To:

Fundraising Number:

Payment Method

Amex  Bank Draft  BranchDonation  Canada Helps

No Receipt Required  Mailing List:

Include Dollar Amounts  Receipt Type: All

Only Yearly Receipts  Donor Type: Both Private and Corp

Only Voided Receipt

Create

This is a very powerful selection due to all the options it offers. When looking to connect with donors who have given a specific dollar range, enter the Amount and Date range and check of Include Dollar Amounts.

This option can select by Receipt Type – charitable gifts where No receipt was required or give totals for all yearly receipts, or find all voids, or locate gifts using the Mailing List field for third party activity or locating all donors who gave to a particular host or event participant using the Acquisition Number and much, much more.



## Using the Breakout Codes

### Receipting Breakout Amount Payment Method Date

In this selection you can choose to find donors who have given to specific BO Codes (or funds) by date and dollar range. The added benefit is to get accumulated totals and by Shared Summary.

This is a great selection to find donors who have gifted to designated areas and who have donated significantly. Targeted campaigns, invitations to openings based, special recognition and more are options that this selection opens up to a charity.

## Donor Retention Report

This is a new report in @EASE and we have provided an overview of how to understand how it works. The Donor Retention Report only runs in the current fiscal year. It only deals with donations and it looks to see how many donors who participated in previous fiscal years have supported current year giving activity. The donor count values show a unique count while the dollars show accumulated value. The report below is for a specific Campaign run in fiscal 2017, the current year of the sample database.

### Donor Retention Report by Campaign

Campaign 2017DMD03

Year	Donor Count	Total Donations
New Donor	0	0.00
2016	4	1,835.00
2015	3	900.00
<b>Total</b>	<b>7</b>	<b>2,735.00</b>



## Seminar Series Topic II

### How @EASE Manages Donor Data

This report is run for all campaigns which may have run in the current year. New Donors are again assessed by whether or not they have given before, so significant other couples where one gives for the first time comes into play.

#### Donor Retention Report by Campaign

Year Between 2000 AND 2017

Year	Donor Count	Total Donations
New Donor	74	8,392.00
2016	25	373,272.00
2015	52	57,377.00
2014	2	100.00
2013	1	75.00
2012	5	650.00
<b>Total</b>	<b>159</b>	<b>439,866.00</b>

To further analyze Donor Retention @EASE has a Donor Retention selection under Donor Selections. The Profile Field shows how the program assessed the donor by the last year they donated or if it view the donor as new.

### Q-Xpress \ Donor Selection \ Donor Retention

## Closing

There are many more ways to select data in different forms or to present them in reports like the Donor Profile Report. Reports in @EASE and Q-Xpress Selections found in the Tutorial Section are useful to assist in learning how to maximize the value of the data a charity collects.