

We have addressed questions from clients and responded to provide @EASE know-how and our expertise. Please Note, we have added two new tutorials, one under FD and Donor Recognition and the other under Q-Xpress Selections.

Thank you for your participation!!! Sharron

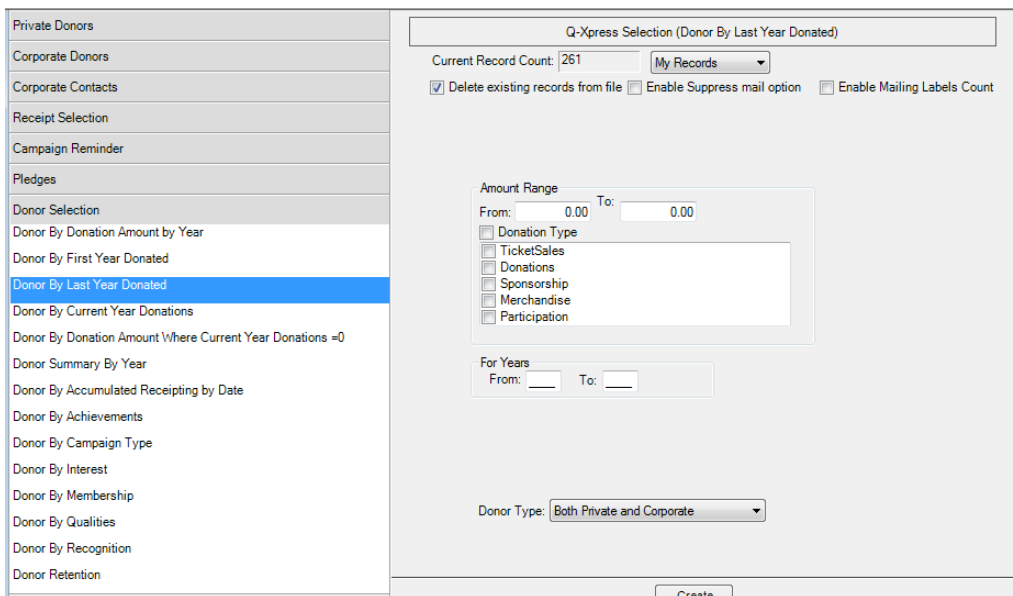
### Roxanne

Question: How to Identify lapsed, current, etc... I am not sure how far back to go for lapsed.

Answer: Each time a donor gives and U2M is run, the Last Year Donated (the charity's fiscal year) is updated.

To find Lapsed donors use Q-Xpress \ Donor Selections\ Donor by Last Year Donated.

Put in the Year Range and a Dollar Range and select the Donation Type






How many years you select from is a good guess in many cases. Possible 5 years? Working with Lapsed donors each year for one or two previous years keeps donors engaged and ensures your charity is top of mind when it comes to giving.

### Linda

Question: I still can't remember how to run my donor board information. I need it sorted by groups (\$100,000 and above, \$50,000-99,999; \$25-49,000, \$10,000-24,999; \$5,000-9,999; \$1,000-4,999; and \$500-999.) Then alpha sorted with both Corporate and individuals included in this sort. Thanks.

Response:

▼ FD Report and Donor Recognition

The Donor Profile Report New! 2016	
How to find donors who give \$500+ individual or accumulated gifts	
Assigning Donor Recognition & Getting an Alpha List New 2017	

The new 2017 tutorial in the above list is the one to use. Updating a Donor Wall takes time, however, because donor activity is accumulated on an on-going basis and you can now add in donations which have not yet been U2M or even Pledge gifts which have not yet been paid, the options are limitless.

Usually, Donor Wall entries are based on a previous set of years and it includes all year. The year range we often suggest using is 1900 – 2016 if your last complete fiscal year is 2016.

The new tutorial addresses finding the donor records, assigning the updated Recognition values and then reselecting using the Recognition with a sort of all donors by name within each grouping.







## Barbara

Question: How to quickly and efficiently create a Constant Contact mailing list of all donors who have donated \$100 or more for a minimum of any 3 years in the past 5 years.

Response: To achieve this selection use Q-Xpress \ Donor Selections \ Donor Summary by Year. There is a tutorial that full describes how this works found under Q-Xpress Selections.

### How to Find your Most Consistent Donors

▼ Q-Xpress Selections

How to Find the Last Donation in a Given Date Range	
How to Export all Private, Corporate and Contact Records New!	
How to Create an Invitation List & Export It .. NEW!	
How to Find your Most Consistent Donors .. NEW!	
Receipting Amount Payment Method Date ...NEW! and Updated!	
Receipting BREAKOUT Amount Payment Method Date ...NEW!	

## Deanne

Question: Can we get a report of pledges that shows the name of the monthly donor, the amount of the donation, and the method of payment.

Response: Each month when you place all pledge details to be paid into Process, you can run the Pledge Transaction Report for the date range of the records in Process. This report provides an alpha list of all transactions by donor name including the monthly amount and payment method.

ABC Foundation

**Pledge Transaction Report**

Payment Method = Credit Card Pledge Date Between from Oct 1, 2017 to Oct 31, 2017

Fundraising Number	Donor Name	Pledge Number	Campaign	Payment Method	Amount	Account No	Date
P000058	Batsch Sharron	89	2016MOONG	Mastercard	\$25.00	*****	Oct 15, 2017
P000062	Gibson Mel	83	2016MOONG	Visa	\$75.00	*****	Oct 01, 2017
P000010	Hamm John	55	2012MOONG	Mastercard	\$25.00	*****	Oct 12, 2017
P000007	Lutz Mike	37	2011MBDON	Mastercard	\$50.00	*****	Oct 12, 2017
P000032	Thompson Gail	90	2017MOPLG	Visa	\$25.00	*****	Oct 15, 2017
<b>Transaction Count</b>					<b>5</b>	<b>Total</b>	<b>\$200.00</b>




Alternatively, you can pull a Q-Xpress listing of all On-going and Fixed-length donations from a prior month using Q-Xpress\ Receipt Selections\ Receipting Amount Payment Method Date and Include Dollar Amounts to get gift details. Select by Campaign Code ... ONG and PLG.

## Sherry, Kirsten and Suzanne

Question: Donors over a certain amount

Response: Please see the selections in these tutorials. You can select by individual gift by date range or accumulated gift by first year.

▼ **FD Report and Donor Recognition**

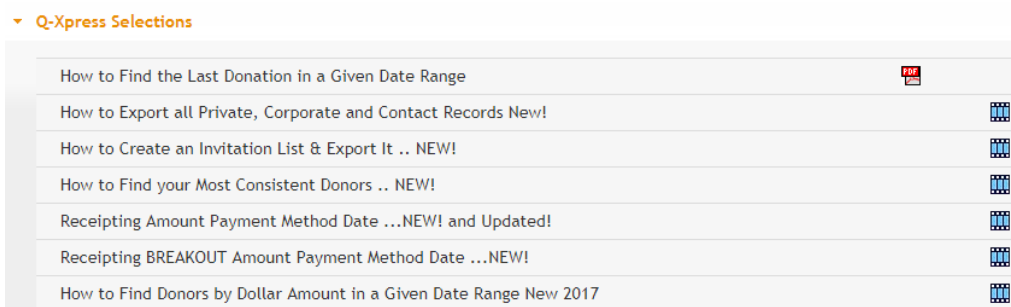
The Donor Profile Report New! 2016	
How to find donors who give \$500+ individual or accumulated gifts	
Assigning Donor Recognition & Getting an Alpha List New 2017	

Question: Donors over a certain amount within a certain time period.

Response: To select donors by dollar range who have given within the current dollar range or by a date range that does not include full fiscal years use Q-Xpress \ Donor Selections \ Donor by Accumulated Receipting by Date.

This selection will find all donors within the date range given and will accumulate their gifts. The output will include the total dollars, the donation count and a list of donors who have met the criteria given.

The tutorial below will show all the steps required.



Question: Participant history (eg. Our golf report that we required to show which golfers have been with us since the beginning)

Response: Currently we do not have one specific method of handling this request, however it is do-able. In the example of golf participants, select all GO PRT or GO Reg over the year range. In Q-Xpress go to View and Sort the output by Campaign. Set up Quality Codes in the Lookup Tables for Golf Year One, Golf Year Two ... or Golf 2010, Golf 2011 etc.

In Q-Xpress View select all golf registrants for 2010 and assign Golf 2010. Continue until all assignments are done.

Using Q-Xpress \ Donor Selections \ Donor By Quality click off all the Golf years and use the AND option. This will locate those golfers who have participated in all years. Note: If they have attended all years from 2010 – 2016 there will be a record for each year in the Q-Xpress View window. Use Q-Xpress \ Remove Duplicates to get a unique list of golfers.

Question: Corporate donors outside of our community

Response: Selection all Corporate records using Q-Xpress \ Corporate Donors \ Select by Number Range. Once selected, use Q-Xpress View and sort the list by Province or Postal Code whichever makes the most sense. You can assign a Quality value to identify these organizations as outside the community. Be sure to create the Quality value first in the Lookup Tables.

Questions: How do I know whether to pop into QExpress or Reports when seeking a report?

Response: Q-Xpress selects a group of records which can be identified by a quality, recognition, membership or donor interest. They can be reported once the group has been identified. Other selections like gifts by dollar range or individual gifts might be used to create output lists.

## Brenna

Question: I would like to see a report on who donated and how much they donated to our Starlite Campaign over the past 5 years, Both corporate and private donors.

Response: This is where recording consistency pays off. Let's say you have a BO Code for Starlite. Using the Q-Xpress \ Receipt Selection\ Receipting Breakout Payment Method Date you can select all donors who have gifted by dollar range by year. This selection also lets you select accumulated donations using Shared Donor information.

The screenshot shows the Q-Xpress software interface. On the left is a sidebar menu with categories like 'Corporate Contacts', 'Receipt Selection', 'Campaign Reminder', etc. The 'Receipt Selection' category is expanded, showing options such as 'Receipting Amount, Payment Method, Date' and 'Receipting Breakout Amount, Payment Method, Date' (which is highlighted). The main window displays a configuration screen for a report. At the top, there are checkboxes for 'Delete existing records from file', 'Enable Suppress mail option', and 'Enable Mailing Labels Count'. Below this is a 'Batch Number From' and 'To' field, both set to 0. A list of BO codes is shown, with 'Camp Kitchen - Camp Kitchen' selected. There are also fields for 'Date From' (Jan 01, 2013) and 'Date To' (Sep 20, 2017), and 'Amount From' (1.00) and 'Amount To' (99,999,999.00). At the bottom, there are checkboxes for 'Payment Method' (Amex, Bank Draft, BranchDonation, Canada Helps), 'Include Dollar Amounts', 'Accumulated Gifts', 'Only Voided Receipt', and 'Use Shared Summary'. A 'Create' button is at the bottom right.

Q-Xpress View will show the selected donors and the total amount they have given to the selected BO Codes or funds.

There is a tutorial under Q-Xpress Selections that is step by step showing how this works.

Wendy

Question: Total number of donors for a particular year/quarter.

Response: This is a good question for our Quik Ease guy. There are many one of questions this area answers and total donors by year or quarter are one of those you can access.

The screenshot shows the Quik Ease software interface. At the top, there are icons for a person and a gear. Below that, the window title is "Quik Ease". The main area contains a search bar with the question "How many gifts did we receive in a given date range?" and a "Find" button. Below the search bar, there are date selection fields: "Receipt Date: Apr 01, 2017" and "To: Jun 30, 2017". There is also a "Campaign:" field. Below these fields is a table with three columns: "Type", "Total Count", and "Total Amount".

Type	Total Count	Total Amount
No Receipt Required	1	\$50,000.00
No Receipt Due to Lowest Value	0	\$0.00
Received Externally	0	\$0.00
Received (printed inhouse)	51	\$117,273.00
To Be Received	154	\$17,367.00
<b>Total Charitable</b>	<b>206</b>	<b>\$183,839.00</b>
Average Charitable Gift	206	\$892.42
Unique Donors	155	\$0.00
	0	\$0.00
Registration Amount	6	\$801.00
No Receipt Required	14	\$30,200.00
Received Externally	0	\$0.00
Received (printed inhouse)	0	\$0.00
To Be Received	0	\$0.00
<b>Total Non Charitable</b>	<b>14</b>	<b>\$30,200.00</b>

The line with 0 and \$0.00 is the cross over from charitable information at the top and non-charitable information below.

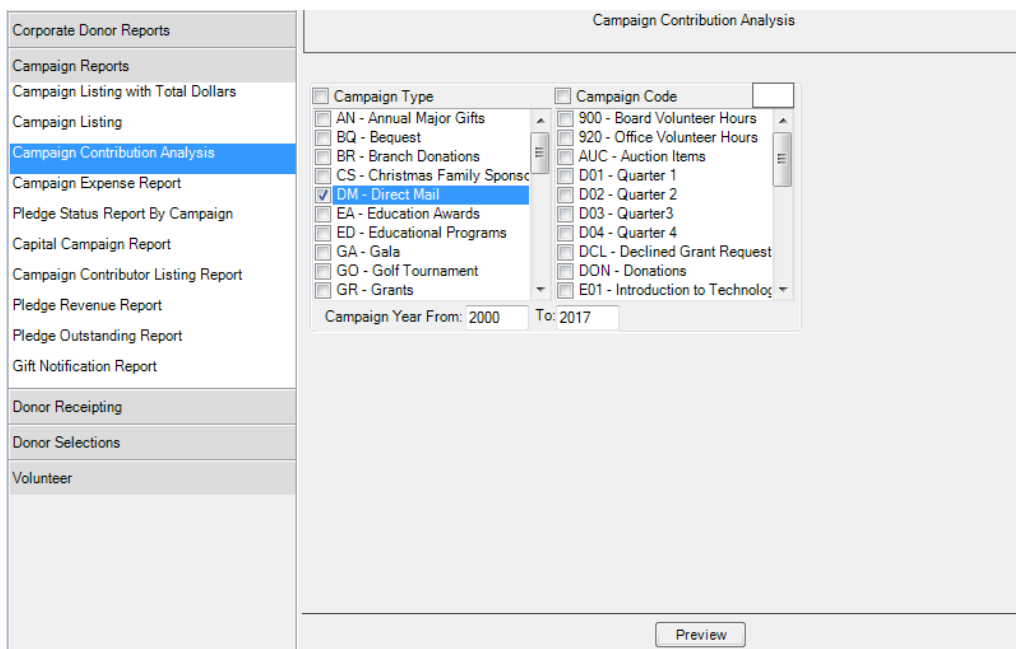
Question: Donors who have lapsed.

Response: This was answered Roxanne's responses.

Question: Number of donations by dollar range.

Response: Each campaign tracks the number of gifts it receives by dollar range. The Campaign Contributor Report found under Reports \ Campaign Reports shows this count.

The Donation Analysis Report will show donations by dollar range by either Zip Code or Postal Code. We recommend the Summary Report as this could end up being wall paper for a large campaign.



**Campaign Contribution Analysis**

Campaign	<=10	<=25	<=50	<=100	<=250	<=500	<=1,000	<=5,000	<=10,000	<=25,000	<=50,000	<=100,000	<=10,000,000
2001DMD04	0	2	4	2	5	1	0	0	0	0	0	0	0
2002DMD04	0	1	9	6	5	2	2	1	0	0	0	0	0
2005DMD02	0	0	0	0	0	0	0	0	0	0	0	0	0
2006DMD01	0	1	2	1	0	1	0	0	0	0	0	0	0
2007DMD01	0	0	1	1	2	0	1	1	0	0	0	0	0
2007DMD04	0	0	7	6	9	2	1	0	0	0	0	0	0
2008DMD01	0	1	1	1	7	2	4	0	0	0	0	0	0
2009DMD02	0	13	1	5	3	2	1	1	0	0	0	0	0
2010DMD01	0	3	15	17	3	4	0	0	0	0	0	0	0
2011DMD04	0	14	8	6	11	0	0	0	0	0	0	0	0
2013DMD02	1	8	20	13	4	3	2	2	0	0	0	0	0
2014DMD01	0	1	7	0	0	0	0	1	3	0	0	0	0
2014DMD02	0	2	0	2	2	1	0	1	0	0	0	0	0
2015DMD01	1	0	2	7	6	2	0	3	0	0	0	0	0
2015DMD02	1	12	9	45	25	12	4	6	0	0	0	0	0
2015DMD04	98	3	2	3	0	1	0	0	0	0	0	0	0
2016DMD01	1	0	0	2	1	1	0	1	0	0	0	0	0
2017DMD03	0	0	0	0	0	0	0	0	0	0	0	0	0

Running this report on live data is very interesting. Note the naming consistency of the campaigns which offers comparative reporting.

The Donation Analysis Report offers a further look by specific campaigns.

**Donation Analysis Report by Campaign**

Postal Code/Zip Code from a0a 0a0 to z9z 9z9

Postal Code	Mail Count	Response Count	<=10	<=25	<=50	<=100	<=250	<=500	<=1,000	<=5000	<=10,000	<=25,000	<=50,000	<=100,000	<=10,000,000	Company Amount	Campaign Amount
Campaign: 2016DMD01																	
T2V	0	1	0	0	0	0	0	0	0	1	0	0	0	0	0	1,500.00	1,500.00
T3C	0	1	0	0	0	0	0	1	0	0	0	0	0	0	0	500.00	500.00
T6L	0	1	0	0	0	1	0	0	0	0	0	0	0	0	0	0.00	75.00
T7Z	0	1	0	0	0	0	1	0	0	0	0	0	0	0	0	0.00	150.00
V6E	0	1	0	0	0	1	0	0	0	0	0	0	0	0	0	0.00	75.00
<b>Report Total:</b>	<b>0</b>	<b>5</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2,000.00</b>	<b>2,300.00</b>



**Donation Analysis Report by Campaign**  
Postal Code/Zip Code from 00000-0000 to 99999-9999

Postal Code	Mail Count	Response Count	<=10	<=25	<=50	<=100	<=250	<=500	<=1,000	<=5000	<=10,000	<=25,000	<=50,000	<=100,000	<=10,000,000	Company Amount	Campaign Amount
Campaign: 2011DMD04																	
01247	0	1	0	0	1	0	0	0	0	0	0	0	0	0	0	0.00	50.00
51555	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0.00	25.00	
80127	0	1	0	0	1	0	0	0	0	0	0	0	0	0	0.00	50.00	
<b>Report Total:</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.00</b>	<b>125.00</b>	

### Casey

**Question:** How can a create a report of donations from a certain year that are only from one area (i.e., Alberta)?

**Response:** To handle this request we used the Demographic code. Most clients need to report charitable donations for other charitable organizations so this is a good area to use.

We selected all private donors in the postal code range T0A 0A0 – T9Z 9Z9. This is the complete range for addresses in Alberta. We then assigned AB from the Demographic Table where added AB – Alberta. For the Corporate entries in the sample postal code range we created a series of Demographic codes to complement the information already being captured, but we did by province. AB School, AB Fdn, AB Govt, AB Club and AB Corp. The AB Corp we added after as we wanted the ability to distinguish donations between private and corporate records. The Demographic Report from under Donor Receipt with only a Date Range for the fiscal year being reported is all that is required.

