New Features Fall 2023

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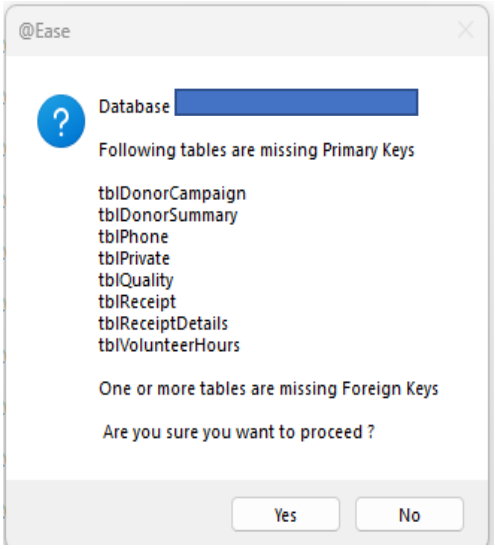
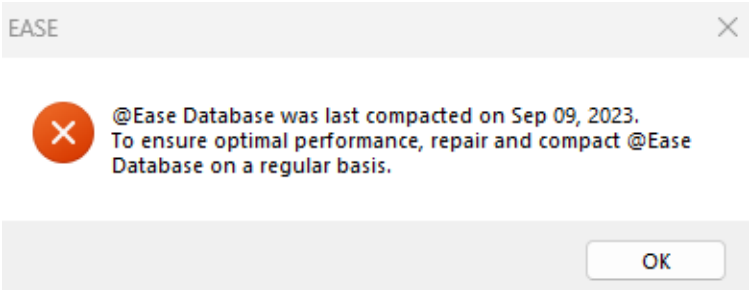
Protecting your Database and Maintaining Current Updates

Further protections were added to @EASE this year.

1. At login, a message that shows the age of your @EASE. If no updates have been run for 6 months a message appears. This is our attempt to keep our clients up to date.
2. If a message like the on below appears at the time you login that indicates there is an issue with the programs indexes, the program will immediately stop so that you can prevent data loss. Batsch Group needs to be contacted to correct this issue.

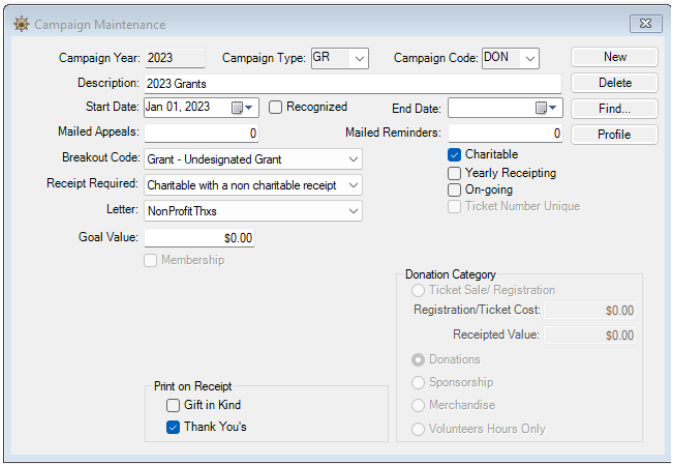


3.



The Compact and Repair Message has been in @EASE since we started offering the program in the mid 1990's. It is an important function for all clients running the .MDB version of the database. When this message is ignored it puts the database in jeopardy. The utility can be run weekly, scheduled by the client's IT department, usually in the early hours of the morning.

Non-Charitable Receipts for Donations from Charitable Organizations



Non-profit organizations can now receive a Non-Charitable receipt for a Charitable donation.

This setup will enable a non-charitable PDF receipt. These receipts are save in the PDF folder along with all charitable PDFs.

The numbering system for non-charitable PDF receipts is found in Organizational Defaults under the Receipt window.

These numbers should be clearly unique and different from charitable PDF receipts.

Updated Analytical Reports

The Review Summary Report

The Review Summary lines which are most critical to analysis have been colourized for easier reading.

This report looks at the Last 10 years, the Last 10 Years by Quarter and the Last Year by Month.

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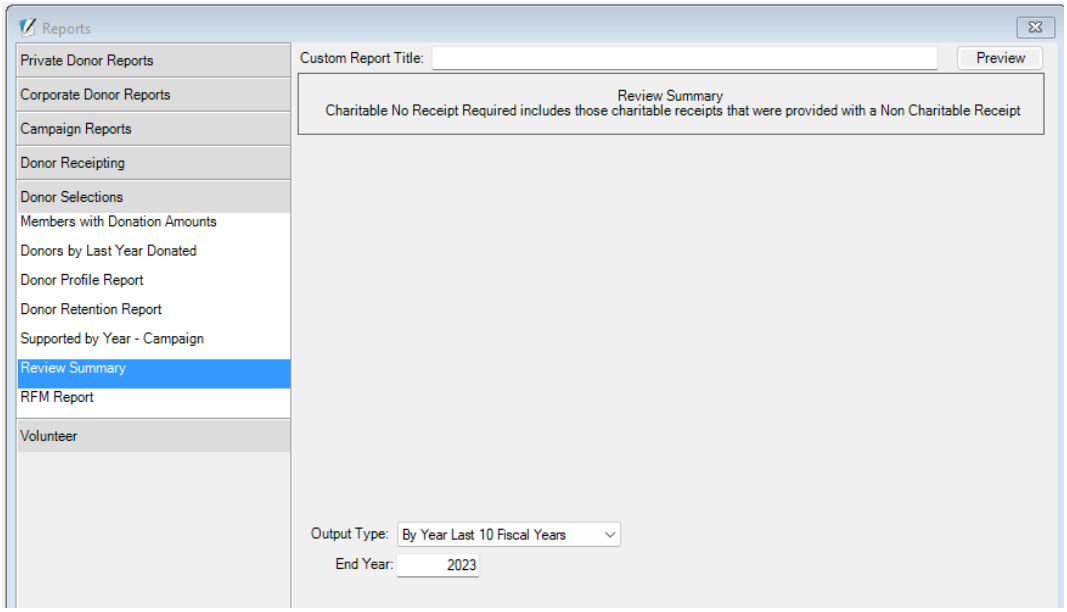

ABC Foundation

Dec 5, 2023

Review Summary

Fiscal Year Range : 2023 - 2014

Type	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014
Charitable-No Receipt Required ($)	2,390	15,000	130,000	94,233	257,454	329,825	228,141	472,656	1,298,208	58,390
Charitable-No Receipt-Lowest Value ($)	45	36	2,533	0	199	0	0	0	0	0
Charitable-Receipted Externally ($)	0	0	0	0	0	0	0	0	0	0
Charitable-Receipted In-House ($)	168,107	2,551	260	57,270	6,046	7,139	218,944	3,401	18,000	3,255
Charitable-To be Receipted ($)	150	1,850	66,950	33,836	4,030	0	0	0	0	0
Charitable-Total ($)	180,509	19,437	199,743	185,339	267,708	336,964	446,283	476,057	1,315,738	61,645
Charitable-Transaction Count	129	13	527	345	233	176	347	154	423	107
Charitable-Average Gift ($)	1,399	1,495	379	537	1,149	1,915	1,286	3,091	3,110	576
Charitable-Unique Donors	42	9	47	56	61	37	161	29	110	20
Non Charitable-Registration Amount ($)	183	0	0	1	21	0	802	0	470	0
Non Charitable-No Receipt Required ($)	2,000	0	0	1,292	100	85,026	30,200	100	112,360	54,330
Non Charitable-Receipted Externally ($)	26,000	0	0	0	0	0	0	0	0	0
Non Charitable-Receipted In-House ($)	100,000	0	0	0	0	0	0	0	0	0
Non Charitable-To be Receipted ($)	35,000	0	0	0	0	0	0	0	0	0
Non Charitable-Total ($)	137,000	0	0	1,292	115	85,026	30,200	100	112,360	54,330
Non Charitable-Transaction Count	14	0	0	7	4	8	15	1	153	23
Non Charitable-Unique Donors	8	0	0	6	4	7	12	1	142	14

The Donor Retention Report

The Retention Report can be run for a specific campaign to see the success of the charity.

Campaign 2023DMD04

Year	Unique Donor Count	Retention %	Total Donations
New Donor	1		15.00
2022	3	38	375.00
2021	5	63	520.00
Total	**9**	**100**	**910.00**

The percentages are rounded, hence 101%.

The Retention Report can be run for an entire year by selecting a broad campaign year range to ensure all charitable campaigns are included.

Percentages have been added to the report offering further information.

To view a years Retention, this report needs to be run in the Current Fiscal Year.

Year Between 2000 AND 2023

Year	Unique Donor Count	Retention %	Total Donations
New Donor	10		12,370.74
2022	7	22	61,788.11
2021	16	50	3,740.00
2020	2	6	25,135.00
2019	2	6	50,000.00
2017	3	9	1,210.00
2015	1	3	1,500.00
2014	1	3	25,000.00
Total	**42**	**100**	**180,743.85**

A New Icon

We offered the IBT PEP program in the 1990's and 2000's to major companies like CPR, Air Liquid, Inland Cement, Petro Canada and many others.

The premise of the PEP program was the elimination of unwanted and unnecessary distractions. In particular, the management of the desktop affects what we do and when we do it.

It is our belief that garbage on the screen simply distracts from what and where a staff member needs to go. @EASE has been designed so all staff including senior managers can run their own reports as no queries are required.

We added the new Icon for fast access to reports that really tell management something of value when they are interested in viewing it. All the reports listed are available in the Reports section of @EASE this just eliminates a click or two.

Using Q-Xpress Data for Selected Reports

Last year we added the ability for users to run reports using the data from a Q-Xpress pull.

Members with Donation Amounts

Donor Profile Report

RFM Report

What a great way to examine your data effortlessly.

We have added the Corporate Contacts Profile report for use with Q-Xpress data.