



New Features June 2023

@EASE

Welcome Administrator

File View Donor Volunteer Campaign Receipting Pledge Q-Xpress Year End Window Help

Batsch Group Inc.

Contents

- Non-Charitable Receipts for Charitable and Non-Charitable Donations 2
- New Additions to Q-Xpress View 3
- QuikLink..... 3
- In Memory Donations and Recognition 4
 - Merging Duplicate In Memory Campaigns 4
 - In Memory Recognition..... 4
- Program Patch is Out of Date 5
- Report Updates..... 5
 - Review Summary Report..... 6
 - The QuikEase Selection 7
 - Donor Retention Report..... 7



New Features June 2023

Non-Charitable Receipts for Charitable and Non-Charitable Donations

Currently, @EASE offers non-charitable receipts using preprinted forms.

We have added the capability to create non-charitable PDF receipts.

A new feature in the Receipt Required drop-down enables a non-charitable receipt for a gift from another non-profit organization.

This simplifies issuing a receipt for Foundation donations or gifts from other nonprofits without compromising how data is recorded in @EASE.

Receipting Maintenance

Fundraising Number: 3007050 Amphibian Foundation

Batch Number: 20220517001 Corporate Contact:

Receipt Date: May 17, 2023 Date Received: May 17, 2023

Campaign: 2022GASPS 2022 Gala Sponsors

Payment Method: Cheque Chq/Conf number: 12345

Donation Type: Charitable

Receipt Required: Charitable with a non charitable receipt Receipt Number: 0

Acquisition Number:

Amount: \$5,000.00 Breakout >

Breakout	Amount
Gala Spnsr -	\$5,000.00

Registration Amount: \$0.00

Ticket Number: 0

Mailing List:

Pledge ID - Detail ID:

Letter:

T-Ref:

Receipt Notes:

Note:
Receipt Required value
Charitable and Receipt Required
is Charitable with a non-
charitable receipt.

PDF Receipts

Batch Number From: 20220517001 To: 20220517001 Donation Type Charitable

Choose the receipts you want to Create PDF

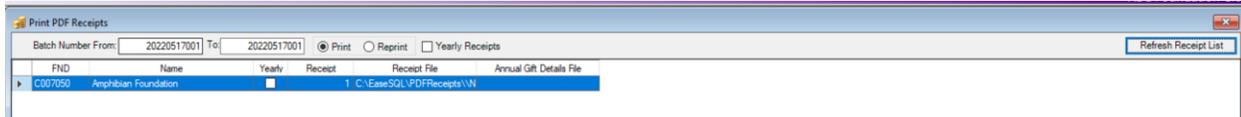
Batch Number	Receipt No.	Fundraising No.	Amount	Printed	Charitable
20220517001	0	C007050	5000.00	No	No

Create PDF Receipt Cancel

Note:
Donation Type Charitable is NOT
checked.



New Features June 2023



OFFICIAL TAX RECEIPT RECEIPT N1

201 10435 178 Street NW Edmonton AB T5S 1R5
Phone (780) 489-9911
E-mail: info@abcfoundation.org Web: www.abcfoundation.org

Date May 17, 2023
C007050 N1

Thank you for your sponsorship.

The Sum of Five Thousand Dollars 00/100 \$ 5000.00

Received From
Amphibian Foundation
PO Box 555
Edmonton AB T6Y 7U8

Authorized Signature 
Executive Director

The receipt number in this example is 1. The N indicates it is non-charitable.

New Additions to Q-Xpress View

The PDF receipt numbers are shared between Charitable and Non-Charitable Donations. To this end, we have added a new column called Receipt Type that identifies the type of receipt issued.

A further field has been added to Q-Xpress View when receipt details are requested. The new field is called Account that comes from the Breakout Code table for your funds and GL Account numbers. The field in the table noted as Bank Account is used for your GL account data.

Q-Xpress View													
Type	Fundraising	GoTo	GoTo	Sort Field	Campaign Desc	Charitable	Receipt Type	Receipt Number	Receipt Date	Date Received	Amount	Account	Breakout Desc
C	C007051			Movie Foundation	2023 Grants	<input checked="" type="checkbox"/>	Non Charitable	2	May 10, 2023	May 10, 2023	1,500.00	12345-00	Undesignated
C	C000776			Sunny Garden Holdings Ltd.	2023 Gala Sponsors	<input type="checkbox"/>	Non Charitable	3	May 10, 2023	May 10, 2023	10,000.00	12349-10	Gala Sponsors
C	C007069			Flowers by LaPue	2023 Grants	<input checked="" type="checkbox"/>	Non Charitable	6	May 12, 2023	May 12, 2023	25,000.00	12345-00	Undesignated



QuikLink



New Features June 2023



The QuikLink will take senior administration to reports that reflect how development is performing for the organization. We have selected a few reports from the existing system to enable fast access.

Colour has been used in some reports to highlight critical results. The Retention Reports provide percentages.

A manual call Know Your Donors offers an easy-to-read overview of many of @EASE's features when it comes to creating better quality data and stronger donor relationships. The Manual has been sent out as part of this update. It can be found in @EASE Tutorials by searching for the name above.

In Memory Donations and Recognition

Merging Duplicate In Memory Campaigns

Several of our clients receive In Memory donations and have an In Memory Donation Wall.

In some cases, In Memory campaigns have been duplicated. We have added a new feature to the Other Utilities area where duplicate In Memory campaigns can be joined.

PLEASE NOTE: There is no room for error, so be sure the correct campaigns have been selected, and the right campaign is chosen to remain. All donations will be transferred to the selected campaign.

Campaigns with a Notification, should it be one to remove, but have the Notification area deleted before the merge can be completed. The Notification information can be manually added to the kept campaign.

In Memory Recognition

The Campaign Listing with Total Dollars report presents the information to determine which In Memory Campaigns have reached a specific dollar value to be added to the In Memory Recognition Wall.

We added a Recognized checkbox for In Memory campaigns that show they have already been identified for recognition. When an updated listing of In Memory campaigns is requested, previously Recognized campaigns can be omitted.



New Features June 2023

@EASE Canadian Demo Campaign Listing with Total Dollars

Jun 19, 2023

Receipt Date from Jan 1, 2000 to Dec 31, 2020

Campaign	Rcnzd	Campaign Description	Total Campaign	Total Count	Corporate \$	Corporate In Kind	Private \$	Private In Kind	Registration
2003MM001	Yes	in memory of John Doe	2,125.00	17			2,125.00		0.00
2005MM001	Yes	in memory of Rose McGuire	6,700.00	78			6,700.00		0.00
2010MM001	Yes	in memory of Wilson Puck	1,875.00	31			1,875.00		0.00
2015MM001	No	in memory of Marilyn Snow	2,775.00	34			2,775.00		0.00
2015MM003	No	in memory of Alice Underkind	9,401.00	38			9,401.00		0.00
Total			22,876.00	198			22,876.00		0.00

You can click Assign Recognized shown above, and the screen below appears.

Campaign	Description	Rcnzd	Total Campaign	Total Count	Corporate \$	Corporate In Kind	Private \$	Private In Kind	Registration
2003MM001	in memory of John Doe	<input checked="" type="checkbox"/>	2125	17			2125		0.0000
2005MM001	in memory of Rose McGuire	<input checked="" type="checkbox"/>	6700	78			6700		0.0000
2010MM001	in memory of Wilson Puck	<input checked="" type="checkbox"/>	1875	31			1875		0.0000
2015MM001	in memory of Marilyn Snow	<input type="checkbox"/>	2775	34			2775		0.0000
2015MM003	in memory of Alice Underkind	<input type="checkbox"/>	9401	38			9401		0.0000

Had we excluded Recognized from the original selection only the last two campaigns would have appeared. Check the **Rcnzd** box and **Save**. The original report provides the Audit Trail of recognized campaigns.

Program Patch is Out of Date

We have had some clients whose @EASE program is out of date and needs to be updated.

To assist with this at login, @EASE will check its last update against the day's date. If there is more than 6 months difference, a message will appear that recommends checking to see what updates have been sent.

Report Updates

Please note for all reports a Custom Report Title can be added for clarity.

Batsch Group Inc



New Features June 2023

Review Summary Report

We have added colourized lines to four of the most important lines in the report for greater visibility.

Total Charitable dollars, Transaction Count, Average Gift and Unique Donor Count

This report is run over the last 10 year, over the last 10 quarters by Quarter and last year by month.

Review Summary
Fiscal Year Range : 2020 - 2011

Type	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011
Charitable-No Receipt Required (\$)	94,233	257,454	329,825	228,141	472,656	1,298,208	58,390	9,046	23,860	465
Charitable-No Receipt-Lowest Value (\$)	0	199	0	0	0	0	0	0	0	0
Charitable-Received Externally (\$)	0	0	0	0	0	0	0	0	0	0
Charitable-Received In-House (\$)	57,270	106,046	7,139	218,944	3,401	18,000	3,255	6,670	34,318	3,238
Charitable-To be Received (\$)	33,836	4,030	0	0	0	0	0	0	0	0
Charitable-Total (\$)	185,339	367,708	336,964	446,283	476,057	1,315,738	61,645	15,716	57,378	3,303
Charitable-Transaction Count	245	234	176	347	154	423	107	178	206	43
Charitable-Average Gift (\$)	537	1,571	1,915	1,286	3,091	3,110	578	89	279	77
Charitable-Unique Donors	56	62	37	161	29	110	20	36	70	14
Non Charitable-Registration Amount (\$)	1	21	0	802	0	470	0	0	800	400
Non Charitable-No Receipt Required (\$)	1,292	100	85,026	30,200	100	112,360	54,330	34,270	67,500	53,130
Non Charitable-Received Externally (\$)	0	0	0	0	0	0	0	0	0	0
Non Charitable-Received In-House (\$)	0	0	0	0	0	0	0	0	125	0
Non Charitable-To be Received (\$)	0	0	0	0	0	0	0	0	0	0
Non Charitable-Total (\$)	1,292	115	85,026	30,200	100	112,360	54,330	34,270	67,625	53,130
Non Charitable-Transaction Count	7	4	8	15	1	153	23	12	11	18
Non Charitable-Unique Donors	6	4	7	12	1	142	14	4	10	13



New Features June 2023

The QuikEase Selection

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

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

Receipt Date: Jan 01, 2020 To: Dec 31, 2020

Campaign: 2020MD04 2020 Direct Mail Campaign Fall

Right click inside the grid to Preview/Export

Type	Total Count	Total Amount
Charitable-No Receipt Required	9	\$480.00
Charitable-No Receipt-Lowest V...	0	\$0.00
Charitable-Received Externally	0	\$0.00
Charitable-Received In-House	3	\$61.00
Charitable-To be Received	14	\$6,686.00
Charitable-Total	26	\$7,227.00
Charitable-Average Gift	26	\$277.96
Charitable-Unique Donors	24	\$0.00
	0	\$0.00
Non Charitable-Registration Amo...	0	\$0.00
Non Charitable-No Receipt Req...	0	\$0.00
Non Charitable-Received Exter...	0	\$0.00
Non Charitable-Received In-Ho...	0	\$0.00
Non Charitable-To be Received	0	\$0.00

You can view information specific to a campaign.

This report can be printed when moving the cursor to the grid area and using a right click to get the Preview window.

Total Charitable dollars

Donation Count

Average Gift

Unique Donor Count

Donor Retention Report

This report can only be run in the current year and is based on current year charitable donations.

The current year on my test data is 2023.

Reports

Private Donor Reports

Corporate Donor Reports

Campaign Reports

Donor Receipting

Donor Selections

Members with Donation Amounts

Donors by Last Year Donated

Donor Profile Report

Donor Retention Report

Supported by Year - Campaign

Revenue Summary

RFM Report

Volunteer

Custom Report Title: The Retention Report displays results for the current fiscal year. The report reflects a count of donors who have been retained, reactivated or who are new to the current year. The displayed totals show a count of the number of gifts received in the current year with accumulated dollars. They are arranged by the last fiscal year these donors gave a gift of. (Donation Type = Donation/Ticket Sales/Registration (Charitable Only))

Campaign Type: Campaign Code

All - Annual Major Gifts
 BR - Branch Donations
 CQ - Conference
 CS - Christmas Family Sponsor
 DM - Direct Mail
 EA - Education Awards
 ED - Educational Programs
 GA - Gala
 GM - Gaming
 AUC - Auction Items
 D01 - Quarter 1
 D02 - Quarter 2
 D03 - Quarter 3
 D04 - Quarter 4
 DCL - Declined Grant Request
 DON - Donations
 EIT - Introduction to Technology
 FMS - Family Membership
 GIK - Gifts in Kind

Campaign Year From: 2020 To: 2023

Preview

Note the Campaign Year represents all potential gifts received in the current year which would include donations to campaigns from previous years.

You can run this report for a specific campaign run in the current year to see the results showing new donors and those who donated to the campaign with the last year they donated.

Donor Retention Report by Campaign

Year Between 2000 AND 2023

Year	Unique Donor Count	Retention %	Total Donations
New Donor	4		1,750.00
2022	6	22	1,325.00
2021	14	52	3,075.00
2020	1	4	135.00
2019	2	7	50,000.00
2017	3	11	1,210.00
2015	1	4	1,500.00
Total	31	100	58,995.00

The report displays a percentage based on retention. The count of new donors is not included in the calculation.