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Section I Setup

I: @EASE Contents & Resource Listing

- @EASE Tutorial Content Listing June 2024
- @EASE Cloud Tour
- @EASE Help Files Zip Download
- @EASE Security and Adding NEW @EASE Users
- EASE KMS Documents
- Handy Keyboard Short-cuts & Using FIND
- How to Install an Update
- My @EASE Windows are Funny ... Here is the Fix!
- Questions about Security
- Tutorial Listing for Charities with No Training Budget
- Using @EASE on a MAC
- Using a French Keyboard

I: ChatGPT Thoughts on NonProfits

- Is Fundraising Simple
- The value of a Knowledge Management System
- Chinese Proverb: The Palest Ink is better than the Best Memory
- Job Descriptions and Accountability for Successful Fund Development
- The Importance of Donor Retention
- The Value of Trained Staff
- @Ease Fund Development Software

I: Know Your Donors & Strengths

- Donor Relationships, Decisions & Success

I: Fundraising Ideas & Free Seminar Materials

- Foundations: How to Build Content and Record Requests, Awards and Declines
- Organized!
- Q-Xpress Selections
- Reports to Support Donors and Analytics
- The UnEvent
- Video Thank You Message and New Donate Now Features
- What we Know about our Donors and Funders

I: Special Donor Handling Routines

- Merging Donors
- Sharing Donor Summaries
- Separating Shared Donor Summaries

I: A Thoughtful Discussion on Data Management

- Life of a Donation
- Series I: Create Consistency to Benefit Fund Development
- Series II: How @EASE Manages Donor Data
- Series III: Manipulating Your Data
- Series IV: Managing Interactions and Content

Section II Working with @EASE

II: @EASE Lookup Tables & Populating the Database

- @EASE Lookup Tables an Introduction
- Tables for Private, Corporate and Contact Records
- @EASE Lookup Tables Qualities – Characteristics about your Donors, Funders and more
- Demographic Code
- Communications Tab
- Campaign and Receipt Lookup Tables
- Memberships for Boards, Committees and Special Groupings
- Volunteer Lookup Tables

II: @EASE Day One Setup

- Read: The Anatomy of the Private, Corporate and Contact Masters
- Read: Reports and Extracts
- Organization Defaults Organization Tab
- Organization Defaults Receipt Tab
- Organization Defaults Other Tab
- Organization Defaults Email Tab

II: @EASE Day One Review

- How to Create a Private Donor
- Entering an Address in @EASE
- How to Set up a Significant Other Couple (Found under II: Private Donors)
- How to Create a New Corporate Donor with a Contact
- Campaign and Receipt Lookup Tables
- Direct Mail Campaigns
- How to Build a Direct Mail Campaign
- How to Enter Donations to the Direct Mail Campaign
- How to Run a Receipt Batch Report and Check your Data Entry Updated 2016!
- The Batch Report New 2023
- How to Print Receipts and Run Update to Master Updated 2016!
- How to Void a Printed Receipt
- How to make a Receipt Copy and Other Receipt Fixes
- How to Re-set a Printed Receipt, Correct and Re-use it. New 2017
- Just Receipting
- How to Create an Export File for Thank You Letters
- How to Add an MLA or MP to @EASE
- How to Enter Receipts with Varying Breakout Codes
- PayNow Button on the Receipt Maintenance Window
- Donations with a Special Designation
- Opt-In and Opt-Out How it Works

II: Private Donors

- How to Set up a Significant Other Couple
- Family Members
- Salutation Greeting
- Achievements

II: @EASE Analytics & Reports

- @EASE Dashboard Without the CLUTTER Perspective

- Donations Analysis Report
- Campaign Listing with Total Dollars Analytics by Year, Quarter
- Reports you Need when Visiting a Donor
- Donor Profile Report
- Members with Donations Amounts
- How to Report a Finite Set of Donors
- Finding Your Most Committed Donors
- QuikEase Dashboard Selections
- Campaign Contribution Analysis
- Supported by Year – Campaign
- Review Summary
- Analytics Webinar Notes October 2019
- RFM Recency Frequency Monetary Report

II: @EASE Productivity: The EaseKMS and Communications Tab

- EaseKMS and Communications Tab
- Using the Communications Tab
- Accessibility
- Your EaseKMS: A Template for Greater Productivity

II: Campaign Maintenance: How to Setup a Campaign or Appeal

- Campaign Setup is Important
- Campaign Seminar Notes
- @EASE Campaign Naming Conventions ... Preventing CLUTTER!
- How to Setup an In Memory or In Honour of Campaign
- How to Setup a Membership Campaign
- Managing Grants
- Third-Party Campaigns
- United Way Donations
- Setting up a Campaign to Record Unsolicited Gifts in Kind
- Anonymous In Memory or In Honour of Gifts
- A Deceased Donor and an Estate Gift
- Managing Deceased Donors

II: Dickens – CRM and Moves Management

- Dickens and @EASE Tools for Moves Management
- Dickens and Prospect Management
- Friday Freebie Overhead Notes
- Global Assign to Dickens Using Q-Xpress View New 2023
- Using Dickens – an Updated Overview
- Using Dickens to Record an Address Change
- Dickens and a Global Assign

II: Recognizing Donors and In Memory Campaigns

- Accumulated Donations by Date Range
- Assigning Donor Recognition
- Find a List of all Donors in a Fiscal Year
- In Memory Campaign Recognition and Handling Duplicate In Memory Campaigns Updated 2023
- Recognition Using Participation

II: @EASE Using an OnLine Auction

- Running an OnLine Auction for your Special Event

II: Online Training Seminars

- Private, Corporate and Contact Records Online Training
- Why Campaigns are So Important
- Creating and Printing Receipts
- Productivity: Information, Knowledge and Time

Section III Advanced Modules

III: Managing Grants

- Managing Grants

III: Pledge Maintenance

- Pledges: Fixed Length & On-Going
- Building a Pledge Master Record
- Updating an Existing Pledge Master Record
- Pledge Batch Report
- Processing and Posting Pledges
- Declined Gifts & Credit Card Expiry Handling
- How to Update Decline Pledge Transactions
- Posting Paid Pledges
- Canceling a Pledge
- Viewing Pledge Activity by Donor
- Annual Receipting
- Monthly Pledge Handling Check List
- Using iATS & @EASE Integration Updated May 2021
- Monthly Process of iATS Pledge Transactions
- Building Ongoing Pledge Details for the Next Year

III: Managing Lottery Tickets with Ease

- How to Build a Lottery Ticket Campaign
- Entering, Finding and Exporting Lottery Tickets
- Entering Non-consecutive Ticket Numbers

III: Managing Memberships

- Setting up a Membership Campaign
- Recording a Membership
- Finding Members by Renewal Date
- How Many Members do we have in a Year as of a Given Date?

III: Special Events: Plan to Deliver

- Planning is Key to Success
- Setting up the Lookup Tables
- Defining Your Campaigns
- Auction Donation Campaign
- Ticket Sales Campaign
- Sponsorship Campaign

- Prize Campaigns
- Donation Campaign
- Auction Purchases Campaign
- Revenue Campaign
- Volunteer Campaign
- Recording Gala Responses
- Recording Table and Ticket Sales
- Recording Auction Donations
- Recording Sponsorship and Prizes
- Recording Donations
- Recording Silent and Live Auction Sales
- Recording Revenue
- Special Events Reports and Formats
- Q-Xpress Selections for Special Events
- Using EaseKMS Effectively

Section IV eReceipts

IV: eReceipts and How they Work

- Setting up Organizational Defaults for eReceipts
- Setting up a Campaign to enable eReceipts
- Setting up a Donor to Accept eReceipts
- Recording a Donation and Sending an eReceipt
- Using eReceipts
- Social Networking Icons on the eReceipt email
- eReceipt Authentication

IV: PDF Receipts and How they Work

- Setting up Organizational Defaults for PDF Receipts
- Creating and Printing PDF Receipts
- Non-charitable PDF Receipts for Non-charitable Gifts
- Non-charitable Receipts for a Charitable Donation

Section V Q-Xpress Exports and Imports

V: Q-Xpress Features

- An Introduction to Q-Xpress
- Q-Xpress Exclusions
- How to Review Address Information
- Using Q-Xpress to Export Donations from a Batch
- Exporting From Q-Xpress View or Q-Xpress Export
- Using Q-Xpress Preview
- Q-Xpress Export format using Q-Xpress View Export includes Accounting Information
- Q-Xpress Export format using Q-Xpress Export from the Main Menu for Merging with Word

V: Q-Xpress Selections

- How to Find your Most Consistent Donors
- How to provide a list of all charitable gifts for your auditor
- Receipting BREAKOUT Amount Payment Method Date

- Receipt Amount Payment Method Date ... NEW! And Updated!
- How to Find Doors by Dollar Amount in a Given Date Range NEW
- How to Export all Private, Corporate and Contact Records
- How to Find the Last Donation from a Donor in a Given Date Range
- How to Select Donor Records for Your Holiday Solicitation
- Which Donors Gave \$2500 + in the Last 5 Years

V: Importing Donors, Contact and Donations

- CSV Import File Format
- XML Import File Format
- Importing a List of Potential Sponsors into @EASE
- Understanding the @EASE Import: An Overview
- Importing a Group of Walk Participants

V: Segmenting Your Corporate Donors

- How to Use Q-Xpress Filter for Quality Assignments
- How to Import Quality Values from a CSV File
- Segmenting Your Donor Database Presentation Handouts

Section VI Reports

VI: Reports in @EASE

- Looking at the Batch Report
- Day to Day Activity Reports Updated
- Campaign Listing with Total Dollars
- Donor Profile Report
- Members with Donation Amounts
- Corporate Contacts Profile Report
- Retention Report
- New Features 2019 and Comparative Reports
- RFM Recency Frequency Monetary Report
- Reporting on the Success of Account Managers and their Teams
- How Many Dollars Collected by Breakout Code

Section VII Donate Now and Raise Funds with Ease

VII: @EASE RFWE, Donate Now, Donate Admin, iATS and Import

- Donate Now – RFWE 2024 Update & Documentation
- Donate Now, iATS and @EASE Recurring Gift Integration
- Using iATS & @EASE Integration Updated May 2021
- New Features May 2020 Receipts and Video Thank You
- Donate Now Update News
- How to Add or Modify Team Payments
- Donate Now – Importing to @EASE September 2020
- Adding and Modifying Manually Entered Gifts
- How do Monthly Pledges Import to @EASE?
- Importing a Pledge from Donate Now
- iATS Decline Codes
- Organizational Defaults Organization Tab
- Reconciling Donate Now Transactions
- Reconciling Donate Now, the Batch Report and the Bank

- Embedding a Donate Now Page on a Custom Site or Commercial Site like Wix

Section VIII: Azure Cloud

VIII: Azure Sponsorship

- Applying for your MS Sponsorship
- How to Setup your Azure Subscription
- Applying for the Premium 365 License
- Adding and Updating Your Credit Card Information
- Renewing Your Subscription
- Why Do You Need the **.onmicrosoft.com** Email?
- Backup for your Ease Database and EASEKMS Files
- Determining Azure Speed in MS
- Going to a Remote Desktop Environment
- Updating your Azure Password
- Using Web Client on Your Azure Remote Desktop Account

Section IX Word Processing

IX: Word Processing and Merging

- Q-Xpress Export format using Q-Xpress Export from the @EASE Main Menu for Merging with Word
- Building a Newsletter Export File
- Merging with Word 2016 Eliminating Blank Lines from Merge Docs
- How to Create a Word Document to Print Multiple Thank You Letters

Section X New Features and Q&A

X: Auditors Questions

- How to provide a list of all charitable gifts for your auditor.
- How to Record UW donations and Donor Advised Funds
- Phone Number for CRA
- CRA Questions
- Charity Accepts Bottles for Recycling
- Donor Buys a Bench

X: Because You Asked

- Reporting Questions and Answers from @EASE Users
- Recording Silent and Live Auction Sales
- How can I find how many people donated a second time after donating to a specific campaign?
- How to Delete a Corporate Contact

X: New Features

- New Features 2015
- New Features 2016
- New Features 2017
- New Features 2018
- New Features 2019 and Comparative Reports
- New Features 2019 September Update
- New Features 2020 Spring
- New Features 2020 Summer
- New Features 2020 November

- New Features 2021 Spring
- New Features 2022
- New Features 2022 November
- New Features 2022 Year End
- New Features January to Spring 2023
- New Features June 2023
- New Features Fall 2023
- New Features Spring 2024

Section XI Year End

XI: Year End Processing – Fiscal and Calendar

- Updating the Charity's Fiscal Year
- What you Need to Know Before you Get Started on Yearly Receipting
- Yearly Receipts
- Building Ongoing Pledge Details for the Next Year

XII: Volunteers

- Volunteers are VIPs!
- Volunteer Lookup Tables
- Preparing Campaigns to Record Volunteer Hours
- Volunteer Reports
- Volunteer Q-Xpress Extracts
- Capturing Volunteer Hours with Event Hours