



# Donor Development

The Donor Development module provides for easy-to-create donor profiles, and tracking of donor pledge status, gifts, and designations.

This module offers Donor Profiles with demographics, employment information, contacts, interests, pledges, deferred gifts, dated memos, gift statistics, gift history, communication history and Estate Plan. Also includes:

- In the gift entry process, a recording of the gift, printing of the receipt, a label, and individual historical documentation are all one process.
- Pledge entry captures type of pledge, pledge amount, gift category, gift designation, pledge start and end dates, due date and ability to establish pay cycles.
- A library of gift and pledge category messages provide for any number of different receipt messages without retyping.
- The flexible user defined tables provide for identifying donor types, solicitors, mailing codes, pledge codes, gift categories, and designations.
- The donor and amount of the gift can be determined for any designation.
- The ability to track taxable and non taxable donations.
- Donor labels which are based on user-defined criteria can be produced at any time.
- Query the Donor Profiles and gift statistics on a very selective basis using the extensive range functions.
- A great tickler memo follow up feature to enhance the memory of tasks to accomplish.
- Ability to produce donor addresses for mail merge.
- The Donor gift history report has the ability to have only one donor per page for year-end mailings.
- Donor Development offers an abundance of information that can be queried in unlimited ways to accomplish the development process.

## Reports

- Cash Receipts Register
- Donor Birthday/Anniversary Report
- Donor Deferred Gift Report
- Donor File Selection Reports
- Donor Gift History Report
- Donor History Report
- Donor Labels
- Donor List by Gift Amount
- Donor Pledge Reminder List
- Donor Pledge Report
- Donor Recognition Report
- Gift by Donor Type/Amount
- In Honor/Memory of Report
- Mailing Code Group Reports
- Memo Follow-Up Reminders
- Monthly Cash Receipts
- Pledge Forecast Report
- Pledge Transaction Register
- Yearly Cash Receipts

## Integrates with

Admissions & Census, General Ledger and Resident Marketing

## Key Features

All tables have the ability to be modified to meet the individual needs of your facility.

User defined query and reporting range and sort options.