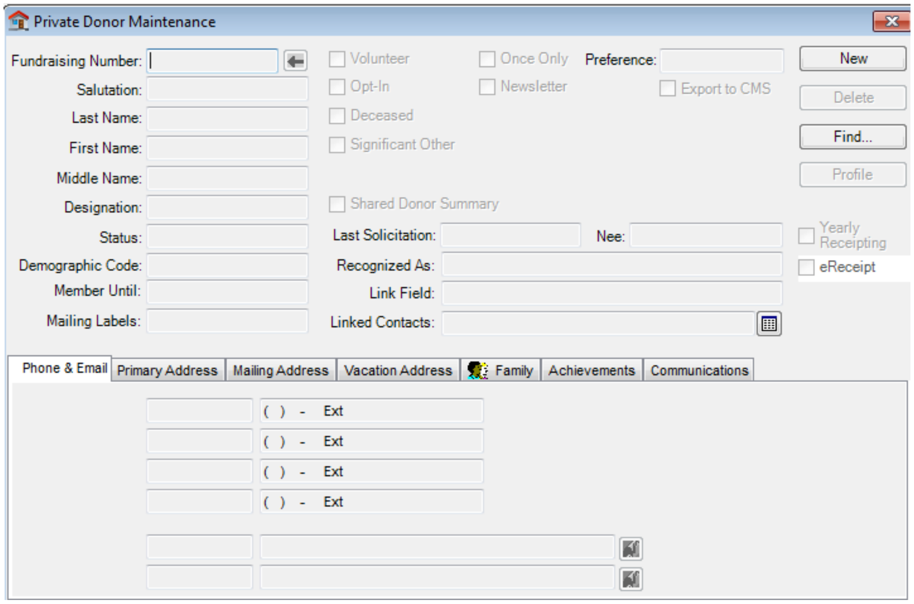
The Anatomy of an @EASE Maintenance Window

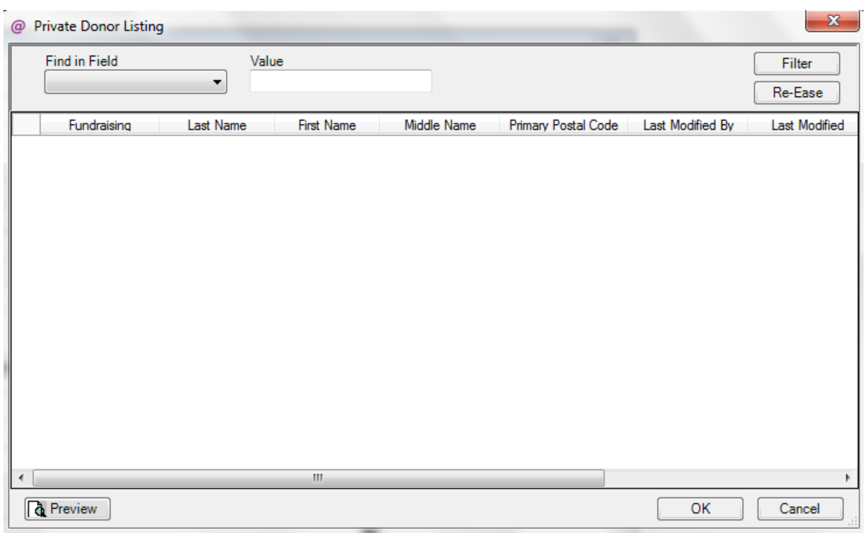


This is the Private Donor Maintenance window. It is in one of two possible states:

1. **New** We wish to add a new individual and their information, or
2. **Find** We wish to look for an existing individual already in the database.

Find is the preferred starting point to avoid a duplicate entry being added.

Find windows in @EASE all have similar characteristics.



Find in Field lists the different search fields available.

The **Value** button provides the search criteria.

The **Filter** button initiates the search based on the field and value given.

Re-Ease is like **Refresh** and lists records in the sequence they were added.

Value entries:

By Name: The * is a wild card and represents characters before, after or both of the search string entered.

donald will find all names that have the letters ‘donald’. McDonald, MacDonald, Donaldson. Searches do not require capital letters

By Date: There are several tables which search by date. All dates are entered into @EASE using a three character month, one or two character day followed by a comma, space and a four-digit year.

Jan 1, 2014

When the Date is followed by an ‘*’ the program looks for all records with the date given and any date beyond it. Jan 1, 2014* finds records with dates starting at Jan 1, 2014 to the present.

By Email: *@shaw.ca will find all shaw email addresses. Ease* will find Ease@batschgroup.com or Ease@telus.com or EaseofUse@yahoo.com

By Phone: Phone numbers are housed as a numeric string. To search for a phone number an ‘*’ character will be needed. The format for a phone number is:

area code + phone number (no formatting) + extension (up to 6 characters)

7804538899123 is area code 780, phone number 453-8899, ext 123

By Postal Code: Capital letters are not required, but the delimiter character is.

T5S* will find all records with a Primary postal code starting with T5S.

*1R5 will find all records with a Primary postal code ending in 1R5.

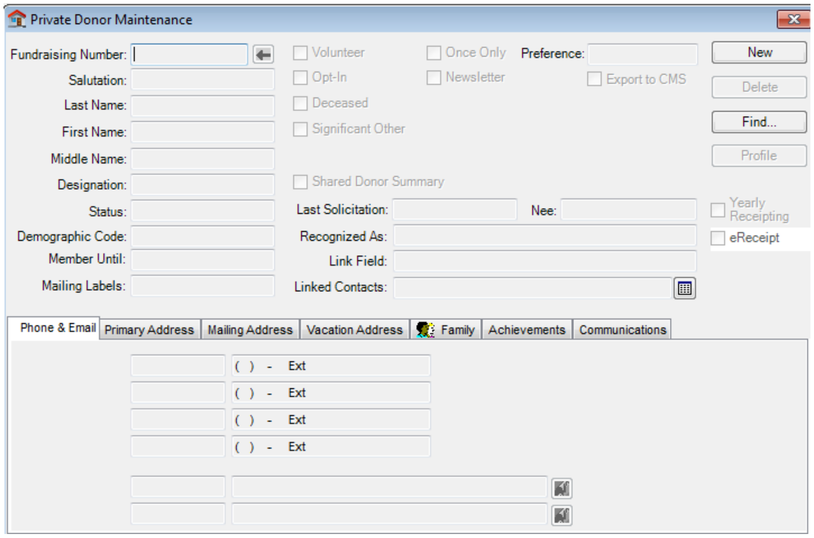
To search specifically for T5S 1R5 the space between the first and last three characters is required.

By PO Box: Search for donors with rural addresses can be difficult. We recommend using *555* to search for PO Box 555 Stn M.

Rules for entering values are common to all Find windows.

We recommend extra care and time when looking for existing records. It is not uncommon to find a Stein entered as a Stien or a McDonald entered as a MacDonald.

Private Donor Window



Basic Information:

- **Fundraising Number**: This provides a unique identification number for each master record found on the system. It is used to link gifts, contact information and profile data to the record. P for private, C for corporate, each followed by six digits.
- **Salutation:** A salutation is required where there is no first name. In the event there is only an initial for the first name the <Default> salutation should be selected to ensure an acceptable greeting field can be built when an export for letters or personalized communications is desired. The <Default> Greeting field is defined in Organizational Defaults, found under File \ System Maintenance \ Organizational Defaults \ Receipt.
- **Last. First & Middle names**: For couples who share a last name and require no special handling the First Name field can show both names as in John & Mary. When entering a couple with different last names or who play different roles with an organization, two separate records are built and linked through the Significant Other option. A Shared Donor Summary can be used to accumulate their gifts by fiscal year to one common summary.
- The **Designation** is a professional designation. This field allows for keyboard input, but as in all cases where pull-down selections exist, we recommend entering values into the tables through File \ System Maintenance \ Lookup Tables to ensure consistency. This field is ten characters in length. We discourage the use of periods and commas.
- **Status** is a System Field. There are four possible values:
    - Active: implies you can connect with the donor for fundraising.
    - Not for Fundraising: These are records that are retained in the system for other purposes. The individual being entered might be an advocate or a volunteer who gives time but not money or they may have been a donor who no longer gives, but the intent is to keep their record & history available. An example is a deceased donor.

- Inactive: This is used when identifying donors who have not given for a long time. @EASE tracks the last fiscal year a donor has been active with a charity, so finding inactive donors is quite easy. There is a process called Remove Inactive Donors under System Maintenance. When run, it removes all information about the donor. We suggest care be taken entering a record as Inactive.
- Permanently Inactive: This identifies records the organization wishes to purge. It may result in a request from a donor or advocate. When Remove Inactive Donors is run, all information will be removed.

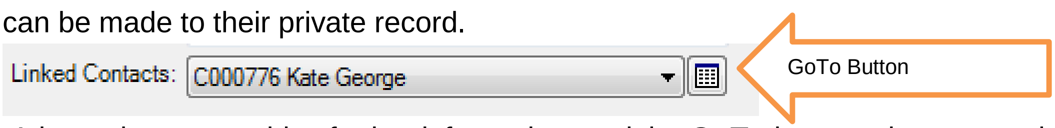
In the case where a charity wishes to removed Inactive or Permanently Inactive records a copy of the database is made before the activity being run and saved in an Archive folder.

The Status field is one of the Exclusion categories offered in @EASE through the Q-Xpress\Q-Xpress Exclude set of selections.

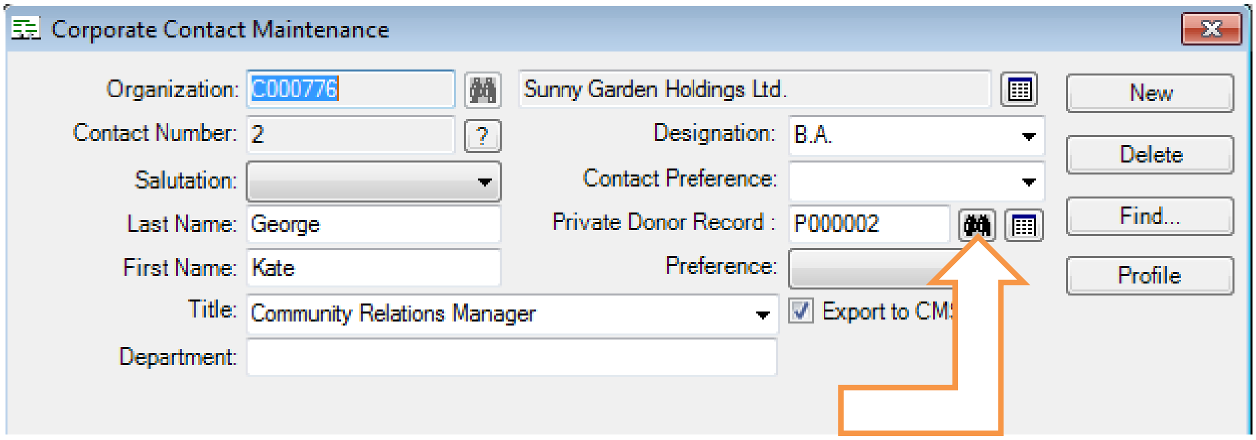
- **Demographic Code:** This is a ten character code with a 50 character description. The ten character code can be used logically with character positions representing specific pieces of data. There is a report called the Demographic Report that shows donation activity by group. For corporate records, this field can be used to differentiate between for profit and not for profit organizations. It can be very useful for participatory fundraising events like walks or runs where the charity wishes to find out more about who registered for the event. Keyboard entry makes this field very useful as the potential number of combinations can be considerable.
- **Member Until:** For charities which have members this view only field will display the latest renewal date defined by a membership campaign transaction.
- **Mailing Labels**: This is a numeric field. It is rarely used but can be useful if a charity sends printed materials and the recipient requests more than one copy.
- **Volunteer**: The volunteer box when checked indicates the person is a volunteer. When using Assign Volunteers found in the Volunteer menu only those people or companies which have this field checked are listed. This field can be globally assigned to, as well as globally cleared, for those records displayed in the Q-Xpress View window.
- **Opt-In**: For all new records Opt-In is automatically checked. This field is used to determine permission to contact. Q-Xpress Exclude by Status will remove all records where the box is left empty. When left empty the value implies Opt-Out.
- **Only Once**: Some donors ask to be contacted only once a year. When checked, this field offers an exclude option when exporting records from @EASE through Q-Xpress Export.

> Where Only Once is checked, a complementary value in the Profile is required. The field Qualities has a series of Only Once values that can show which month a donor requests contact. (For example Only Once: 12 Dec.) If they have indicated a spring request is also acceptable Only Once: 04 Apr may be added. This is used to facilitate requests from donors. Only Once: Never is used to address a generous donor who warned, Never ask!

- **Deceased:** If a donor is deceased this box can be checked. When checked the Status changes to Not For Fundraising. Deceased is an Exclusion found under Q-Xpress Excludes \ Status.
- **Newsletter**: Organizational Defaults has a Newsletter box; when checked all new entries will have their Newsletter checked as well. We **DO NOT** recommend using this field.
- **Preference:** This field uses the Language Lookup Table. Organizational Defaults defines the default language for the organization. The Preference field does not require entry where the individual or company uses the default, but it should be defined where a different language is required. For charities with a large bilingual group of donors and contact, English might be the default language and only those records that prefer another language like French need to be coded. This field is one of the export fields and is useful when sending letters through a merge activity as it can route the record to a language-specific document.
- **Export to CMS**: Where this box is checked, the user can export updated records to a list for import into other applications like Outlook. Q-Xpress has a special selection for this export. In the 2014 update, it can be found under Administrative Selections.
- **Last Solicitation Date**: When exporting a list for solicitation, the Last Solicitation Date can be updated to include the donor and their significant other where one exists. It can be updated manually when a major donor is asked for a gift. This field is one of the Exclusion categories offered in @EASE through the Q-Xpress\Q-Xpress Exclude set of selections.
- **Nee**: This is a searchable field found in the Find options for Private Records. It is used for the birth surname of a woman.
- **Recognized As**: Many clients have donor wall, and this provides an opportunity for the donor to specify how they would like to be noted. Anonymous may be their choice. Recognized As is one of the fields which will always export with any Q-Xpress selection. When the field is left blank, it is populated by @EASE using the ToWhom field, part of the inside address created by Q-Xpress.
  ***In the case of a Shared Donor Summary, this field must be defined; otherwise the word **Undefined** appears in the field.
- **Link Field**: The Link Field is a searchable field. It is used to record some other piece of information viewed as necessary by the charity. Colleges use this for the Student Number.
- **Linked Contacts**: A private individual might have connections as a staff member to one or more organizations. When recorded through the Corporate Contacts window, a link can be made to their private record.

  A hover button provides further information, and the **GoTo** button takes you to the Contact record. Click the **down arrow** at the end of the box for other possible selections.



The Binoculars button is where the connection is made between the private and contact record. A GOTO button lets you move between the private and contact records.

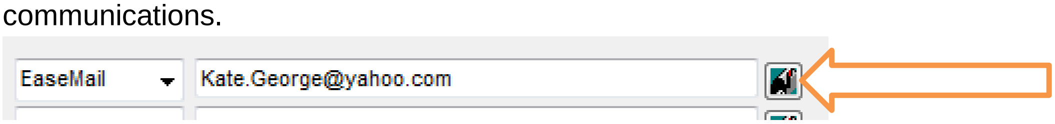
- **Yearly Receipting**: Check this box, and all donations entered by not yet receipted will be marked for Yearly Receipting on the receipt transactions. Uncheck the box, and the yearly request is removed. Yearly Receipt is updated only at the donor’s request.
- **eReceipt**: Check this box, and all donations entered by not yet receipted will be marked for an eReceipt. Uncheck the box, and the eReceipt request is removed. eReceipts are provided at the request of the donor.

  Both Yearly Receipting and eReceipt are default values which update all new gifts automatically when they are entered in the Receipt Maintenance window.

Tabs

Phone and Email

- All phone numbers and email addresses must have the Type field populated. Phone and Email Type values are entered in the respective tables in the Lookup Tables area.
- The first email is considered the Primary Email used for eNewsletters, and all email communications.



The mailbox icon on the right lets you email directly to this person by clicking the box. Please note: **No entry** of this activity is made in Dickens; where a reference is desired Dickens should be used.

Primary Address, Mail Address, and Vacation Address

- The Primary Address should be used 99% of the time. All records require an address except those where there is a Significant Other relationship, and the Suppress Mail option has been allocated to one member of a couple.

- We do not recommend using the Mailing Address except in unique situations. Where used it becomes the default. We recommend its use for colleges who wish to mail to the student's current address but maintain their family's home address in the primary address for reference.
- The Vacation Address has a date range. Where vacation addresses are used the date range determines where mailings are sent. A Quality called Vacation Address would enable the charity to track those donors with a vacation address so that updated dates can be entered.

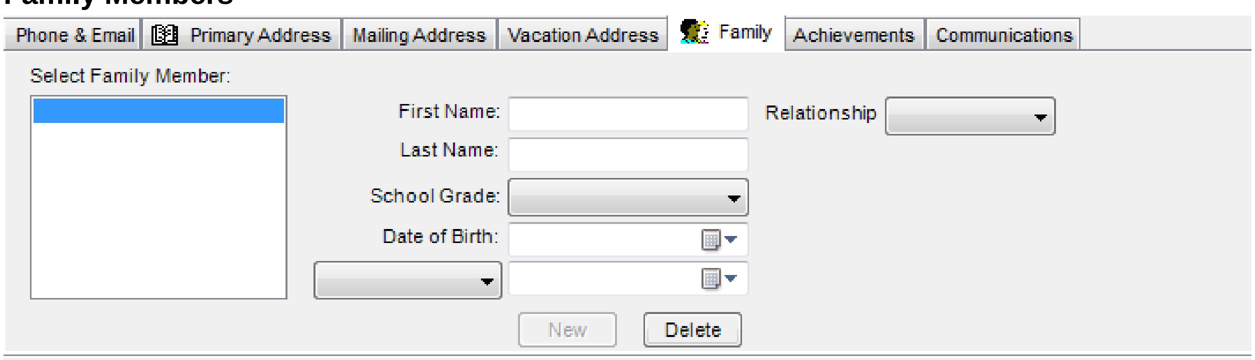
There is extensive information in @EASE on building an address.

- Each municipality has its own rules regarding the use of ordinal suffixes, and these rules should be followed to achieve the best address entry.
- No periods, # signs, or commas
  View the *@EASE Help* **– Address, Phone & Email** to complete this section. **Data Entry Tips & Tricks** in the *QuikEaseTutorials*, watch **How to enter an address in @EASE.**

  Every export created through Q-Xpress builds a 6 line address fully composed and ready as an inside address for a letter or an address for a label or envelope.
  The individual address fields are also provided so that periodic checks can be made to ensure correct entry.

  Each line in Q-Xpress View has a GoTo button to help with any corrections. Changes are not dynamically updated to the View window, but changes will be apparent in the next Q-Xpress selection.

Family Members



- To enter a family member, start with the first name. Tab to the next field and the last name is populated with the same name as the one on this Private master record. This field can be modified to reflect the many blended families.
- **Relationship:** The entries for this table are added through the Relationship table in the Lookup tables. It is an important field as it describes the family members, a girl, boy, mother, family dog, or the family cat.
- School Grade: This value can be entered if you can keep that information up to date.

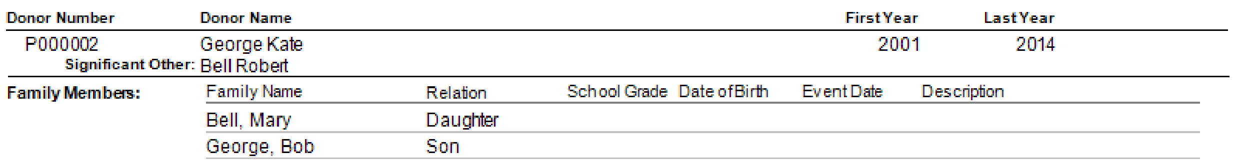
- Date of Birth, when entered, will display the current age of the family member.
- **Family Event Date:** The blank box is a field definable by the charity. It offers only one value that is date significant.
- Click Save on the top right of the Private window to keep additions or changes.

To Add a New Family Member

Once the first record has been added and **saved**, click the New button at the bottom of the window to enter another member. Data entry follows as described above.

Family members are shown on the Donor Profile Report. Where a Significant Other relationship exists, the family members from both records are displayed on the Donor Profile Report.

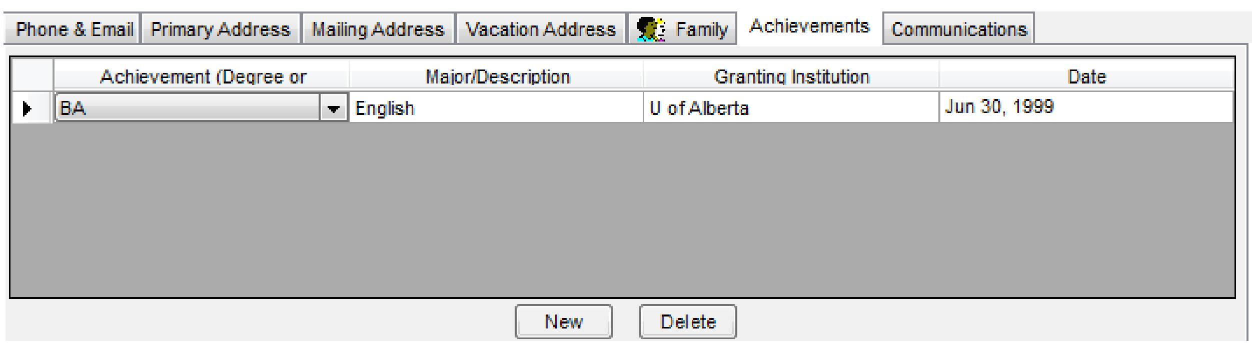
In the example below, Kate George and Robert Bell are a ‘Significant Other’ couple who have children from prior relationships. One child is entered on Kate’s record and the other on Robert’s record. Both are reported.



Donor Number	Donor Name	First Year	Last Year
P000002	George Kate	2001	2014
Significant Other:	Bell Robert		

Family Members:	Family Name	Relation	School Grade	Date of Birth	Event Date	Description
	Bell, Mary	Daughter				
	George, Bob	Son				

Achievements



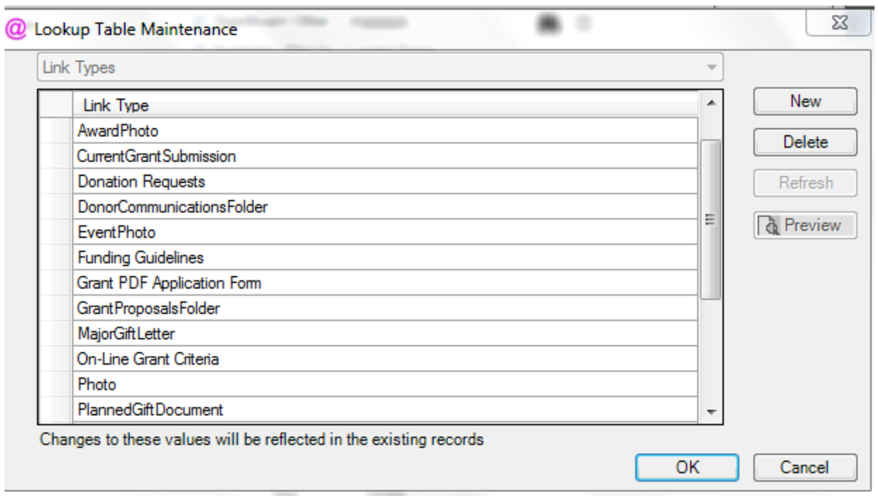
Achievements consist of three fields defined in the Lookup Tables and a date. To add an achievement, the **New** button must be clicked, and the **Save** button in the top right-hand corner of the Private window saves it. There is no requirement for a Major/Description, but the other fields are required.

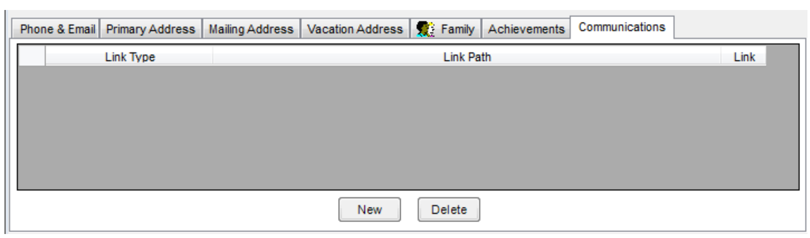
This field is ideal for degrees if the organization is a college or university. For other charities, this field provides a record of recognition received by service clubs, chambers of commerce and more. Individuals who have received achievements can be extracted through Q-Xpress using Donor Selections. This information prints on the Donor Profile Report when the Achievements box is checked.

Communications

The Communications tab is designed to link private and corporate master records to documents, websites, social media, photographs, pledge agreements and whatever else the charity deems necessary to save.

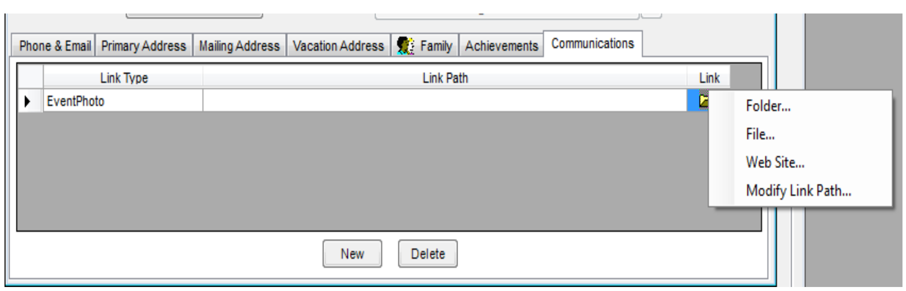
Link Types: The Link Types field is used to define all of the various links.





Click the new button and select a Link Type. Click the Link on the right and select the type of link being created.

- **Folder** takes you to Browse for Folder window
- **File** takes you to Open window
- **Web** Site pastes a URL path
- **Modify Link Path** enables an edit of any of the above entries

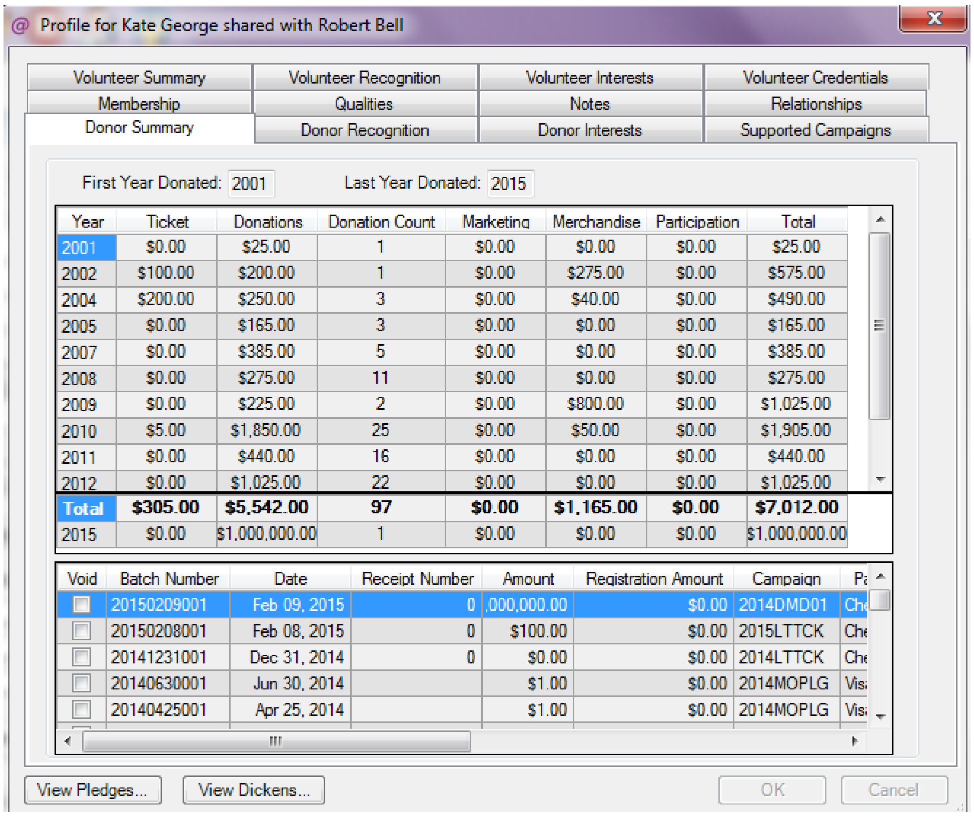


The Donor Communications folder found in the EaseKMS is designed to create folders or *drawers* to house documents of all sorts for elite donors.

Profile Tabs

The Profile is where the charity records relationship information to understand better those individuals who support its work. Not all individuals will have extensive profiles. Here the 80-20 rule abounds.

Note in the example below; we have a Significant Other couple who are sharing a Donor Summary.



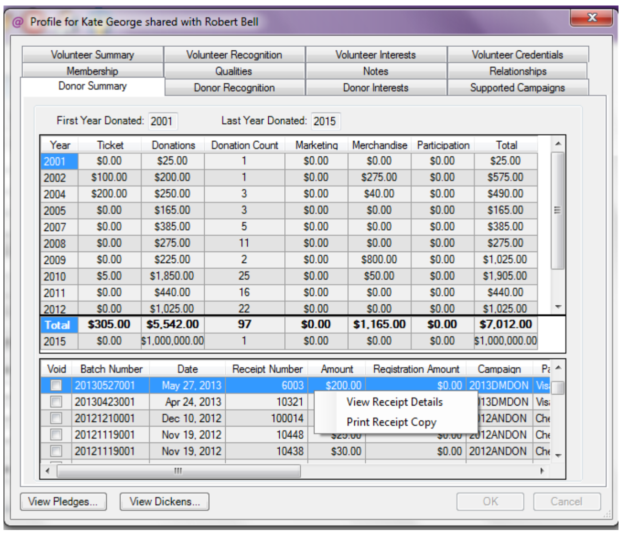
Donor Summary: This tab shows the first and last fiscal year a donor has gifted to the charity. For each fiscal year, they have participated, this tab displays a grid of activity by year.

- **Year** is the fiscal year.
- **Ticket** is the non-charitable or benefit portion of a gala ticket.
- **Donations** provide the accumulated total of cash gifts.
- **Donation Count** shows how many times gifts were added to the Donations total.
- **Marketing Sponsors** is for sponsorships given by corporate donors. Private records rarely if ever would show values in this column.
- **Merchandise** is the category which can be used for Gifts in Kind or cash purchases of any kind such as a lottery ticket.
- **Participation** is updated when an individual acquires a gift on behalf of the charity as in a walk or run where pledges are collected. This is also useful for capital campaigns and in some cases special events where ticket sales or auction acquisitions are recorded.

Participation dollars are never added to the Donations total, for a fiscal year, but you can recognize donors for their participation dollars using Q-Xpress selections.

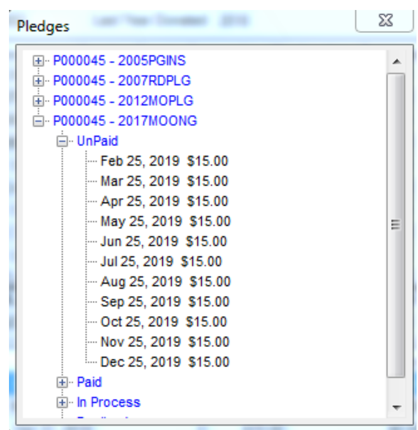
The **Total** line is the total of all years excluding the current year which is shown on the line below. This makes it very easy to see annual commitment as well as total giving. Donor recognition is also fast and accurate.

How do you determine where donor activity is accumulated? The answer is found in Campaign Maintenance where each campaign is defined with a Donation Type value which determines how numbers are tallied to donor records.

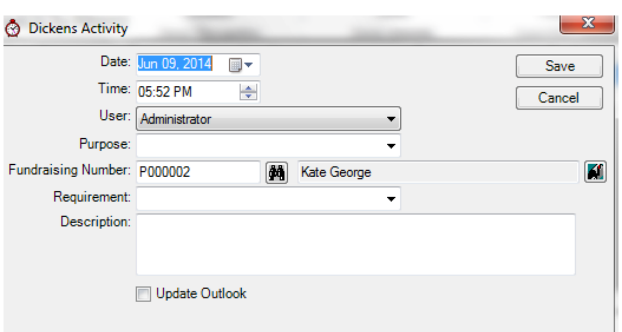


The records below show individual transactions. A regular click offers a view of the Receipt window, but only a view; updates or changes are not enabled. A click to highlight the record followed by a Right click offers the View once more but also a Print Receipt option providing the donation has been given a receipt number, and the record is not void.

View Pledges: If the donor has an active pledge or one that is complete. Clicking View Pledges provides a small schematic of the gifting activity.



View Dickens: Click here, and all Dickens activity is shown regardless of the user who made the entry. Dickens is the @EASE CRM tool. New entries in Dickens can be entered, or past entries can be reported. Note the Preview and New buttons.



An entry in Dickens can move directly to Outlook for email or update the Outlook calendar.

Donor Interests: This is an important table as it addresses why a donor gives to a charity. It offers the opportunity to target specific interests, share a conversation or request funding. This table is **NOT** used for personal interests.

Donor Recognition: This table is used to record recognition levels.

Memberships: Board members, committee members, members of special groupings are recorded in memberships. The Membership table has a Title field and a Date. The Title field is not required.

Notes: For general information which is commonly known, notes are handy. For more confidential information the Communications tab is recommended as it directs the user to secure folders on the charity's server.

Qualities: These are characteristics and just in time entries. Excludes are entered as Qualities. For example: Exclude: Deceased; Exclude: Do Not Solicit

Relationships: Relationships show interactions within the donor database. When an entry is created in Relationships, a reciprocal entry is made.

For example, Bob is the Father of Joan who is his Daughter.

Joan is the Daughter of Bob who is her Father.

Entries in the Relationship table need to have either a Private or Corporate master record.

Supported Campaigns: @EASE tracks donor activity recording the last fiscal year they supported a specific campaign type.

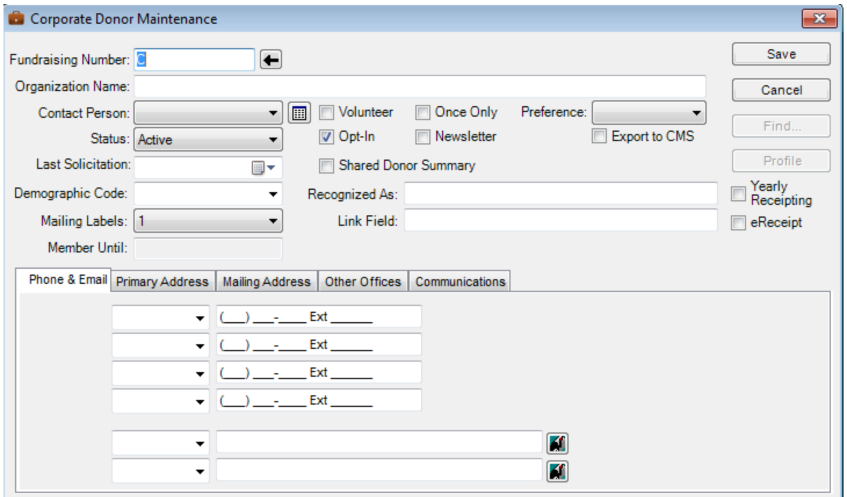
The Profile entries above in blue use the **Lookup Tables** to provide acceptable values as defined by the charity.

Global Assigns with Q-Xpress View

Donor Interests, Donor Recognition, Memberships, and Qualities can all be assigned to or deleted from globally through Q-Xpress View.

Corporate Donor Window

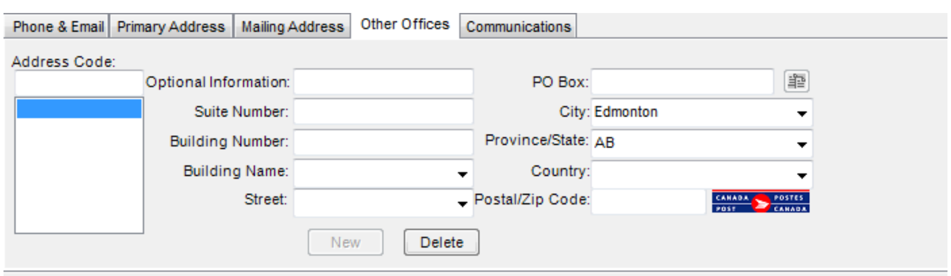
The Corporate Donor Maintenance window is used for all non-private master records. Non private records include businesses, foundations, government, churches, service clubs, associations, and unions.



The main difference between the Corporate window and the Private is the Organization Name and the Contact Person.

Contact Person is a pull-down menu, and names **CANNOT** be added from this point of entry. The Corporate Contact window is used to enter contacts by ONLY once a corporate record exists.

The Contact Person should be chosen carefully as this is the person to whom communications are sent if interactions are selected from the Corporate Profile values.

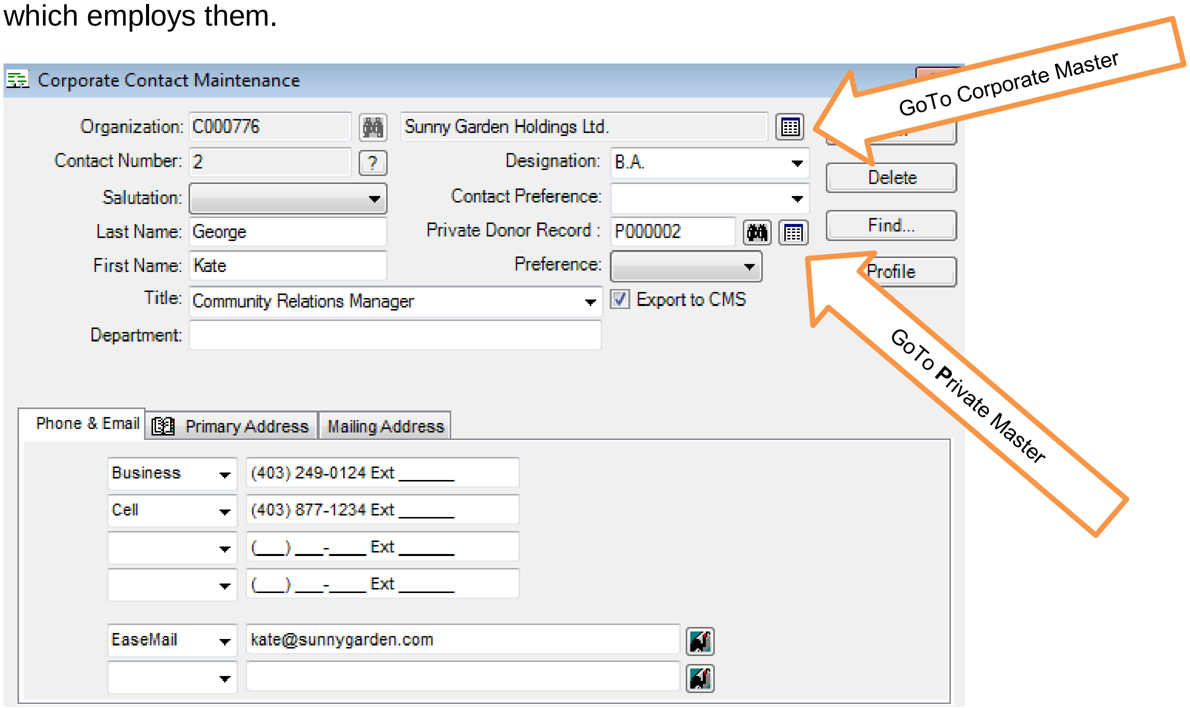


Other Addresses allow for a company to have multiple addresses. Other Addresses works for an organization like Telus which functions as a unit.

It would not apply to institutions like banks or franchise operations. Each Other Address requires a unique Address Code. To add a new Other address start entering and Save when done. For a second Other address click the New button.

Corporate Contacts

Contacts work for companies. They are employees and subject to the profile of the organization which employs them.

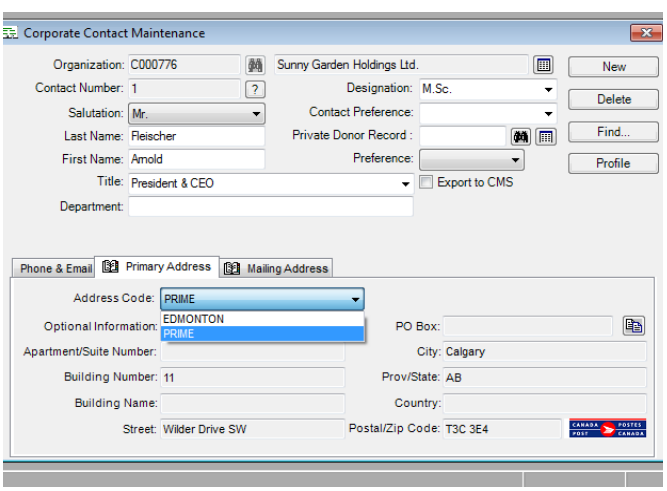


Each contact person has a Contact Number assigned which is unique. It has no other purpose than differentiating between entries.

The field names describe the purpose of the information being captured.

Primary and Mailing Address

We recommend the use of the Primary address only.



The addresses are defined at the Corporate level, and a pull-down menu allows for address selection.

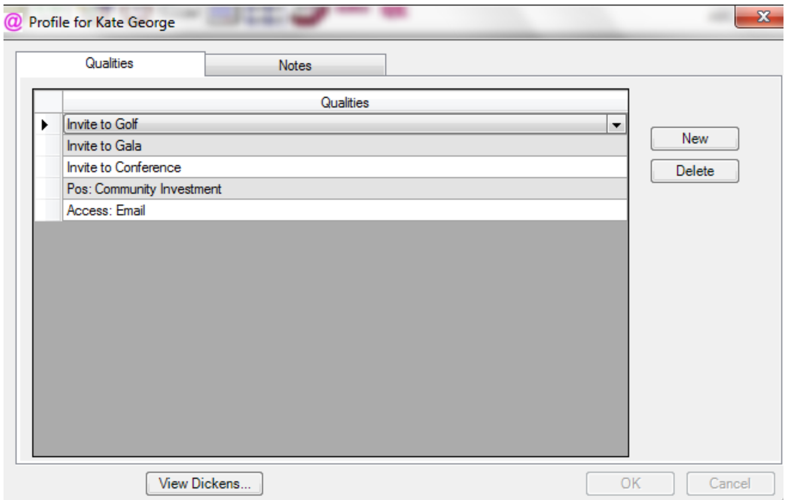
This prevents the need to create address records for each person in a database.

In the Corporate Contact window, addresses are selected from a pull-down menu that is defined at the corporate level.

We recommend placing as much information into the corporate record – telephone numbers, email, and addresses as they populated the fields when entered contacts, which requires less keying.

Profile fields for a corporate record are the same as those for private records.

Contact Profile



The Profile for a contact consists of Qualities, Notes, and Dickens.

We recommend that every contact have one or more qualities to describe how they are beneficial to the charity.

Confidential notes should not be kept in the Notes tab for security reasons.