

# Reports you Need when Visiting a Donor



There are a few reports and notes which are of value when visiting with a donor. The visit might be in person

or by phone. Access to accurate information is critical to maintaining the credibility of charity staff.

The data quality depends on what has been entered or if it has been entered.

## Private Donors

- 1. Donor Profile Report

Robert Bell Family Profile											
Donor Number = P000005											
Donor Number	Donor Name	First Year	Last Year	Donations							
P000005	Mr Robert Bell 145 Willow Road SW Edmonton AB T5T 1C8 Home (780) 486-7774 Business (780) 441-3225 eMail register01@batschgroup.com	2001	2023	146,379.00							
Address: 145 Willow Road SW, Edmonton AB T5T 1C8											
Phone/Email: Home (780) 486-7774, Business (780) 441-3225, eMail register01@batschgroup.com											
Significant Other: George Kate											
Donations:	Campaign	Donor	Receipt #	Receipt Date	Amount	Registration Amount	Payment Method	Receipt Breakout			
	2023DM04	P000002	0	Aug 23, 2023	\$50.00	\$0.00	Cheque	DM Xmas			
Donations by Year:											
	2023	2022	2021	2020	2019	Total	Average				
	3,050	5	1,254	98	414	23	115	3	4,833	129	37.47

- 2. Dickens Report found in the Donor's Profile

Dickens Activity for Administrator									
Find in Field	Value	Date From:		User:	Own Activity	Filter			
Donor Name	Bell*	Date To:		View:	Not Completed	Re-Ease			
ID	Date	Time	User Name	Purpose	Requirement	Fundraising No.	Go To	Donor Name	
▶	Jun 07, 2023	09:53 AM	Administrator	Platinum	Donor Recognition	P000005	📄	Bell Robert	
▶	Jan 09, 2023	11:23 AM	Administrator	Discovery	Luncheon Meeting	P000005	📄	Bell Robert	12:00 PM Holiday Inn 106 Street.

- a. Lists all touchpoints
- 3. Communications Notes, should they exist

› EaseResources › EaseKMS › DonorCommunications › George - Bell Family

Name	Date modified	Type
FamilyPhoto.JPG	2017-10-24 11:34 AM	JPG File
Major Gift Plan.doc	2018-06-14 1:00 PM	Microsoft Word 9...

- a. Notes or gift plans

## Corporate Donors

- 1. Donor Profile Report

- 2. Corporate Contacts Profile Report
  - a. Listing of all employees recorded in the Contacts, giving names, titles, and contact

information.

<b>Corporate Contacts Profile</b>			
C000151 - High Street Marketing			
C000151	<b>High Street Marketing</b>		
Primary Address 201 - 5600 Oak Road SW Calgary AB T2V 4B8		Business (403) 251-2379 Fax (403) 243-4411 eMail marilyn@highstreetmarketing.com EReceipt ease@batschgroup.com	
VAN BC Address 100 - 1004 West Georgia St Vancouver BC V6Y 7U8			
Employee: Marilyn Anderson Director of Human Resources (Corporate Key Contact)			
Primary Address: VAN BC Mailing Address:		Business (403) 251-2379 eMail manderson@highstreet.com	
Qualities: Invite to Conference Pos: District Manager			
Employee: Sharon Johnson Editor Private Donor: P000067			
Primary Address: PRIME Mailing Address:		Business (403) 251-2379 Fax (403) 243-4411 eMail sharon@highstreetmarketing.com	

- 3. Dickens Report
  - a. Lists all touchpoints
- 4. Communications Notes should they exist.
  - a. Notes, sponsorship commitments, & gift plans

*Last updated on September 28, 2023*

© Batsch Group Inc 2023. Powered by Help Scout ([https://www.helpscout.com/knowledge-base/?utm\\_source=docs&utm\\_medium=footerlink&utm\\_campaign=Docs+Branding](https://www.helpscout.com/knowledge-base/?utm_source=docs&utm_medium=footerlink&utm_campaign=Docs+Branding))