



Sarah Lalonde

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Training Specialist

Event from start to end with DonorPerfect

Events are a great way to create buzz around your mission, engage your local donor base, and establish new donor relationships. While fundraising events can be a heavy lift, DonorPerfect can help you throw a hit party with much less hassle.



AGENDA

- Online Forms for Events
- Constant Contact invitations
- Invoices
- Reports
- Partial Receipting



Online Forms for Events

Online Forms



Event

Register event participants online, gather t-shirt sizes or other attendee preferences, and collect registration fees using this form. This form is typically used for fundraising walks and races.

[Use this template](#)



Banquet or Luncheon

This form allows attendees to book tables, purchase tickets, and send you important information about their seating and dietary preferences for your banquet or luncheon.

[Use this template](#)



Golf Event

Collect golf tournament registration information and fees, additional golfers/teams information, and sponsorships using this form.

[Use this template](#)



Bowling Registration

Register bowlers, collect additional bowler/team information, and allow donors to sponsor your bowling event.

[Use this template](#)



Sponsorship Purchase

Nonprofit organizations often rely on sponsors to help them hold fundraising events. This form collects corporate/organization and individual sponsorship information, donations, and additional information.

[Use this template](#)



Brick/Paver Sales

Offer inscribed fundraising bricks or pavers to your donors and specify the paver size and number of paver lines to meet your specific needs with this form template.

[Use this template](#)

Save time!

- Integrated in DonorPerfect
- Registration link on your website
- Embed registration link in email

Examples

Event with ticket and sponsors

Ticket only

Sponsorship

Golf

Conference

Workshop registration

Event with Dinner and Attendees

Download to DonorPerfect

Gift Details

* Date of Gift	10/15/2019
* Gift Amount	\$1,010.00
Non-Eligible Amount (FMV)	\$0.00
* Type of Gift	Credit card weblink
Transaction ID	4960648694
* General Ledger	Event
* Solicitation	Holiday Party 2019
* Acknowledgement Preference	Acknowledge/Receipt
Receiving Preference	Individual
Reference	
Associated Address	MAIN - Ms Sarah Lalonde / 665 Wright / Dorval, QC H9P 2C4 CA
Gift Memo	
	Insert date
Sub Solicitation	Ticket
Thank-You Letter	3 - DPC3 - with receipt
Receipt Delivery Pref.	E-Mail

Created Date	10/15/2019
Created By	WLA
Modified Date	10/15/2019
Modified By	dpccanada01A
Batch Number	0

Qty/Number Attending

Gift ID #	776
Record Type	Gift
Thank You Date	

Attendee Information

Foursome Name

1. Attendee

Name	Ben Wilken
Email	
Shirt	
Select Dinner	Beef
C & W Selection A	
C & W Selection B	

2. Attendee

Name	Everly Wilken
Email	
Shirt	
Select Dinner	Vegetarian
C & W Selection A	
C & W Selection B	

3. Attendee

Name	Sarah Wilken
Email	
Shirt	
Select Dinner	Chicken
C & W Selection A	
C & W Selection B	

4. Attendee

Name	Matthew Wilken
Email	
Shirt	
Select Dinner	Beef
C & W Selection A	
C & W Selection B	

Awareness

Some limits with online forms

REGISTRATION OPTIONS CONTACT INFORMATION CONFIRMATION PAYMENT

Tickets

Quantity

0 x \$250.00 = 0.00

1. Attendee Select Dinner

2. Attendee Select Dinner

- Many modifications can be done with basic package, but if you want to add fields or sections, then you must have DPOF plus
- When Adding new fields, Always create the fields in DonorPerfect first
- Comes into DP as multiple gifts
- All the attendees can make the form longer



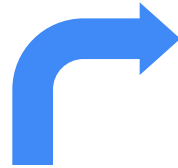
Constant Contact Invitations



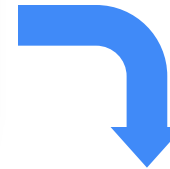
Benefits

- Fully integrated in DonorPerfect
- Easy to use email tools such as drag-and-drop templates
- Add link to your event form with a button
- Create the list in DonorPerfect or upload it.
- Track who opens your invitation

SmartGive Links



* Last Name	Sandstone	Home Phone	(215) 555-1234
First Name	Roger	Business Phone	
Middle Name		Cell Phone	
Suffix		E-Mail	rsandstone@gmail.com
Salutation	Roger		
Professional Title			
Optional Line			
Address	424 Main Street		
Address 2			
City	Horsham		
State	PA		
Zip/Postal	19040	Verify Address	



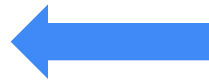
Donate Now!

Donation

Amount \$500 \$250 \$50 Other

Contact Information

First Name	Roger	Address	424 Main Street
Last Name	Sandstone	City	Horsham
Email	rsandstone@gmail.com	State/Province	Pennsylvania
Phone	215-555-1234	Zip/Postal Code	19040



Kids Inc.

WHAT ARE YOUR KIDS DOING THIS SUMMER?

Spend the summer with us at Kids Inc!

Kids Inc. is designed for fun! Whether your kids love sports, games, arts & crafts, nature, or all of it, your neighborhood center for all things summer. Kids Inc. is staffed by dedicated men and women, all CPR-certified, who specialize in different areas. We open early and close late to accommodate the needs of working parents.

You can learn more about Kids Inc. and download an application at our website.

[DONATE TO KIDS INC.](#)

Step by Step

Step 4: Launch Constant Contact Campaign

- Prepare Campaign
- Include custom fields [SG Link]
- SEND!

Step 3: Constant Contact Email

- Custom Fields Mapping
- List - Dynamic or Manual List

Step 2: Set up your system

- Parameters [Mailings]
- Mailings [Mail Merge]

Step 1: DP Online Forms



Invoices

Save

Link Gift

Schedule of Payments

Instant Merge



Pledge Details

* Date of Pledge	<input type="text" value="04/08/2019"/>		* Start Date	<input type="text" value="05/25/2019"/>	
Total	<input type="text" value="\$50,000.00"/>		Billing Amount	<input type="text" value="\$0.00"/>	
* Frequency	<input type="text" value="Annual"/>	▼	* General Ledger	<input type="text" value="General Fund"/>	▼ +
* Solicitation	<input type="text" value="Gala 2019 - Toronto"/>	▼ +	Sub Solicitation	<input type="text" value="Sponsor"/>	▼ +
Solicitor - Pledge	<input type="text"/>	▼ +	Qty / Number Attending - P	<input type="text"/>	
Thank-You Letter	<input type="text" value="2 - Standard TYL - with NC"/>	▼ +			
Associated Address	<input type="text" value="MAIN - The ABC Foundation / 80 Main Street / Ottawa, ON K1A 0A2 CA"/>				
Pledge Memo	<input type="text"/>				
	<input type="text" value="Insert date"/>				
Write-off Amount	<input type="text" value="\$0.00"/>		Write-off Date	<input type="text"/>	
Last Paid Date	<input type="text"/>		Last Date Billed	<input type="text"/>	

Invoice

Laurence Morel
The Academy
123 4th avenue
Montreal, QC H4C 2Z6

INVOICE N° 187-777
October 19, 2019

Quantity	Description	Unit Amount	Total Amount
2	Holiday Party 2019 Table	\$4,000.00	\$4,000.00
		Sub Total	\$4,000.00
		Payment Received	\$0.00
		Balance	\$4,000.00
		Payment Due	\$4,000.00



Please **RETURN** this portion with your payment.



online fundraising software / logiciel de collecte de fonds en ligne

DonorPerfect Canada
A312-1001 Lenoir Street
Montréal QC H4C 2Z6

INVOICE N° 187-777
October 19, 2019

Sub Total \$4,000.00
Payment Received \$0.00
Balance \$4,000.00
Payment Due \$4,000.00

Please ensure that your cheque is payable to the order of:
DonorPerfect Canada

Laurence Morel
The Academy
123 4th avenue
Montreal, QC H4C 2Z6

Payment Amount: \$ _____

Visa Mastercard Cheque



Exp. Date: ____/____/____

Card Holder Name: _____

Signature: _____



Reports

List of Attendees and options

A	B	C	D	E	F	G	H	I	J	K	L	M
DONOR_ID	first_name	last_name	AMOUNT	EVATT	ATTENDEE_T	ATTENDEE_F	ATTENDEE_N	ATTENDEE_F	ATTENDEE_N	ATTENDEE_F	ATTENDEE_N	ATTENDEE_F
50	Albertine	Alonso	\$2,000.00	8	Albertine Alc	CK	Gabrielle	CK	Janet	CK	Daniella	CK
25	Bruce	Banner	\$500.00	2	Bruce	CK	Jenny	CK				
31	William Jose	Batson	\$500.00	2	Will	CK	Betty	CK				
16	Jane	Doughnut	\$500.00	2	Jane	BF	Tim	BF				
18	Albert	Einstein	\$500.00	2	Albertine Alc	BF	Laura	CK				
15	Jimmy	Generous	\$500.00	2	Jimmy	CK	Joy	BF				
48	Robert & Ma	Happy	\$2,000.00	8	Robert	BF	Margaret	VG	Lucy	BF	Mary	CK
43	James	Howlett	\$500.00	2	James	BF	Jamie	CK				
11	Keyth	James	\$2,000.00	8	Keyth James	BF	Lucy James	CK	Maria Smith	BF	Ann-Marie S	VG
51	Edwin	Jarvis	\$2,000.00	8	Edwin	BF	John	CK	Luke	BF	Isabelle	CK
183	Sarah	Lalonde	\$1,010.00	4	Ben Wilken	BF	Everly Wilke	VG	Sarah Wilker	CK	Matthew Wi	BF
37	Erik	Lehnsherr	\$500.00	2	Erik	CK	Erika	BF				
32	Susan	Levy	\$500.00	2	Susan Levy	BF	Brian Levy	CK				
47	Alberto	Lomoralli	\$2,000.00	8	Alberto	BF	Gabrielle	CK	Janet	CK	Daniella	CK
21	Brad	Pitt	\$500.00	2	Brad	CK	Brandie	CK				
30	Steve	Rogers	\$500.00	2	Steve Rogers	CK	April O'neil	CK				
33	Jack	Russell	\$500.00	2	Jack Russell	BF	Gloria Russel	CK				
34	Bill	Stryker	\$500.00	2	Bill Stryker	CK	Louisa Smith	CK				
46	Justin	Trudeau	\$500.00	2	Justin	CK	Sophie	CK				
38	Nyota	Uhura	\$500.00	2	Nuota Ushur	CK	Edmond Gol	CK				
36	Charles	Xavier	\$500.00	2	Jean Grey	CK	Charles Xavi	BF				

Export to file option

List of Attendees and options

Donor ID	First Name	Last Name	Qty/Number Attending	Name (ATTENDEE_NAME_1)	Select Dinner Descr (ATTENDEE_FOOD_1)	Name (ATTENDEE_NAME_2)	Select Dinner Descr (ATTENDEE_FOOD_2)
36	Charles	Xavier	2.00	Jean Grey	Chicken	Charles Xavier	Beef
30	Steve	Rogers	2.00	Steve Rogers	Chicken	April O'neil	Chicken
31	William Joseph	Batson	2.00	Will	Chicken	Betty	Chicken
32	Susan	Levy	2.00	Susan Levy	Beef	Brian Levy	Chicken
33	Jack	Russell	2.00	Jack Russell	Beef	Gloria Russell	Chicken
21	Brad	Pitt	2.00	Brad	Chicken	Brandie	Chicken
16	Jane	Doughnut	2.00	Jane	Beef	Tim	Beef
18	Albert	Einstein	2.00	Albertine Alonso	Beef	Laura	Chicken
25	Bruce	Banner	2.00	Bruce	Chicken	Jenny	Chicken
37	Erik	Lehnsherr	2.00	Erik	Chicken	Erika	Beef
34	Bill	Stryker	2.00	Bill Stryker	Chicken	Louisa Smith	Chicken
38	Nyota	Uhura	2.00	Nuota Ushura	Chicken	Edmond Gold	Chicken

Easy Report option

Solicitation Analysis and Sub-Solicitation Analysis

Solicitation Analysis Report

Date	Code	Description	Mailed	# of Replied Donors	% of Responses	# of Gifts	% of Gifts	Total Revenue	Avg. Gift	Printing	Other	Total	Net Revenue	Total Revenue Per \$ Spent	Cost per 1000	Revenue per 1000	Goal	Variance (Total Revenue To Goal)	
																		\$	%
						REVENUE			EXPENSES			RATIOS			GOAL				
11/16/2019	GA192	Holiday Party 2019	0	49	0	57		\$81,510.00	\$1,430.00	\$0.00	\$0.00	\$0.00	\$81,510.00		N/A	N/A	\$100,000.00	\$18,490.00	18.49
Total:			0	49	0.00	57	0	\$81,510.00	\$1,430.00*	\$0.00	\$0.00	\$0.00	\$81,510.00	0	N/A	N/A	\$100,000.00	\$18,490.00	

Sub-Solicitation Report for 01/01/2019 thru 10/25/2019

Date	Code	Description	Mailed	# of Replied Donors	% of Responses	# of Gifts	% of Gifts	Total Revenue	Avg. Gift	Printing	Other	Total	Net Revenue	Total Revenue Per \$ Spent	Cost per 1000	Revenue per 1000	Goal	Variance (Total Revenue To Goal)	
																		\$	%
						REVENUE			EXPENSES			RATIOS			GOAL				
	SP	Sponsor	0	6	0	6		\$33,000.00	\$5,500.00	\$0.00	\$0.00	\$0.00	\$33,000.00		N/A	N/A	\$0.00	\$33,000.00	
	TA	Table	0	3	0	3		\$6,000.00	\$2,000.00	\$0.00	\$0.00	\$0.00	\$6,000.00		N/A	N/A	\$0.00	\$6,000.00	
	TI	Ticket	0	47	0	48		\$42,510.00	\$885.63	\$0.00	\$0.00	\$0.00	\$42,510.00		N/A	N/A	\$0.00	\$42,510.00	
Total:			0	56	0.00	57	0	\$81,510.00	\$1,430.00*	\$0.00	\$0.00	\$0.00	\$81,510.00	0	N/A	N/A	\$0.00	\$81,510.00	

Who Sold the most tickets?

Solicitor Report


Canvasser	Amount	Tickets Sold
James Mann		
	<i>Total: \$25,260.00</i>	<i>Total: 101.00</i>
Steve Milcik		
	<i>Total: \$23,250.00</i>	<i>Total: 93.00</i>
	Grand Total: \$48,510.00	Grand Total: 194.00





Partial Receipting

Partial Receipt


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DonorPerfect
111 Test Street
Montreal, QC XXX XXX
Phone
Email

Registration N°: 00000 0000 RR0001

Sarah Lalonde
1001 lenoir
Montreal, QC H4C 2Z6

OFFICIAL RECEIPT FOR INCOME TAX PURPOSES
Canada Revenue Agency canada.ca/charites-giving

Receipt N°:	76
Date of Donation:	09/30/2019
Date of Issue:	10/22/2019
Gift Amount:	\$250.00
Advantage Amount:	\$150.00
Eligible Amount	\$100.00
Holiday Party 2019	


Authorized Signature

- FMV before or after the event
- Can be automated with a Calculated field
- Can be activated before or after

Calculated field

Calculation Name: *

Partial Receiving FMV Calculation

Description:

Fills in the advantage amount in the FMV field

Field To Update: *

FMV  change

Update With: *

evatt*125

 [find field](#)

▼ Apply Selection Filter

(Tickets Holiday Party)  

 Show Fewer Options

Include:

- Include Pledge Payments Include Pledges
 soft credits

Calculate When:

- saving importing posting a batch

Status:

- Active



Thank You!

A group of people at a conference, with a central yellow box containing the DPC3 logo. The background is a grayscale image of several people smiling and talking. The logo is centered in a yellow rectangular box with a thin white border. The logo itself consists of a white circle containing a maple leaf, followed by the letters 'DPC3' in a bold, sans-serif font.

DPC3

DONORPERFECT CANADIAN CLIENT CONFERENCE