



Sarah Lalonde

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Integration Power



Save time, Save money and ease your
work!





AGENDA

- ◀ DonorPerfect Online Forms
- ◀ Constant Contact Integration
- ◀ Social Fundraising
- ◀ Customer Relationship Management
- ◀ Payment Processing Platform
- ◀ Monthly giving and Account Updater
- ◀ SmartActions



DonorPerfect Online Forms

http://weblink.donorperfect.com/dpc3_donateMtl



Donation Information

Amount

♥ \$50

♥ \$500

♥ \$250

♥ Other

Type of Donation

One Time Donation Recurring Donation

DonorPerfect Online Forms

Create customized online forms to collect donations, registrations, memberships and more with lots of templates ready to use.



Get the Full donation through Donor Cover Costs

Automatically reflected in the donor records. Easily add solicitation, general ledger and other codes to ensure accuracy.

Send receipts automatically to your donors.



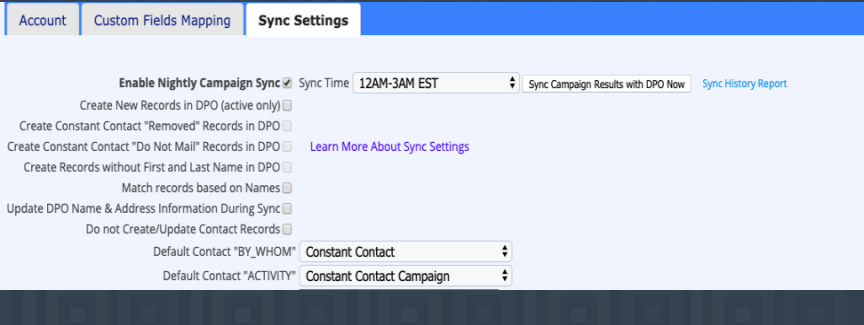
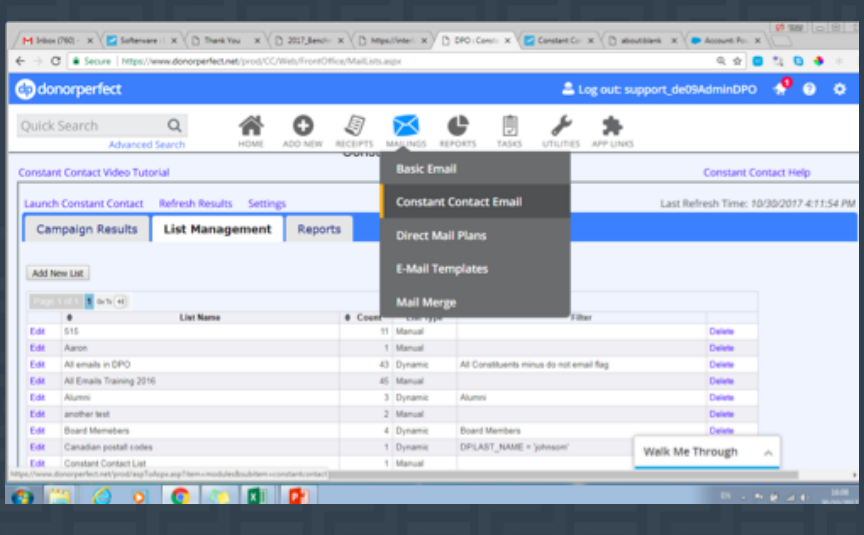
Constant Contact

Create and Send Emails in Constant Contact

- Use available templates or create your own
- Send immediately or schedule for later
- Email engagement tracking tools



Constant Contact Integration



Constant Contact - Campaign Information

CC - Campaign Name	Gala Calgary 2019	CC - Campaign Status	Opened
CC - Status Date	04/18/2019	Bounce Reason	
CC - Campaign Email	slalonde@donorperfect.ca	CC - Campaign Email Status	Active

- Create lists directly in DonorPerfect
- Synch every night to update dynamic lists
- Contact records created automatically
- Opt out updated in DonorPerfect
- SmartGive links



Social Fundraising

Walk for the Mountain

Supporting Mother Nature

\$5,325 of \$10,000 Goal



Please support **Mother Nature** by contributing to our page, or by creating your own. No steps are too small, together we are greater! Please come back often to see our progress! Your support truly makes a difference.

Recent Supporters

Top Fundraisers

Thank you for your support!

10 supporters

Anne **\$500**

The Mountain will be beautiful!

Oct 09

Matty Smith



Oct 09

Roger

\$1,500

Oct 09

Anonymous

\$500

Oct 09

Anonymous

\$1,000

Oct 09

Clara

\$1,000

Oct 09

DP Crowdfunding

Unlike GoFundMe and Facebook, DP Crowdfunding enables you to collect and store all fundraiser and donor data from every campaign.

Integration with Partners

- When using partners the info is pushed with API directly in DP

Some examples:

- Aka Raisin - Peer-to-Peer and more
- GiveCloud - Shopping Cart and more
- More Partners!

<https://www.donorperfect.com/integrations/>



Contact Manager

◀ Contact Manager

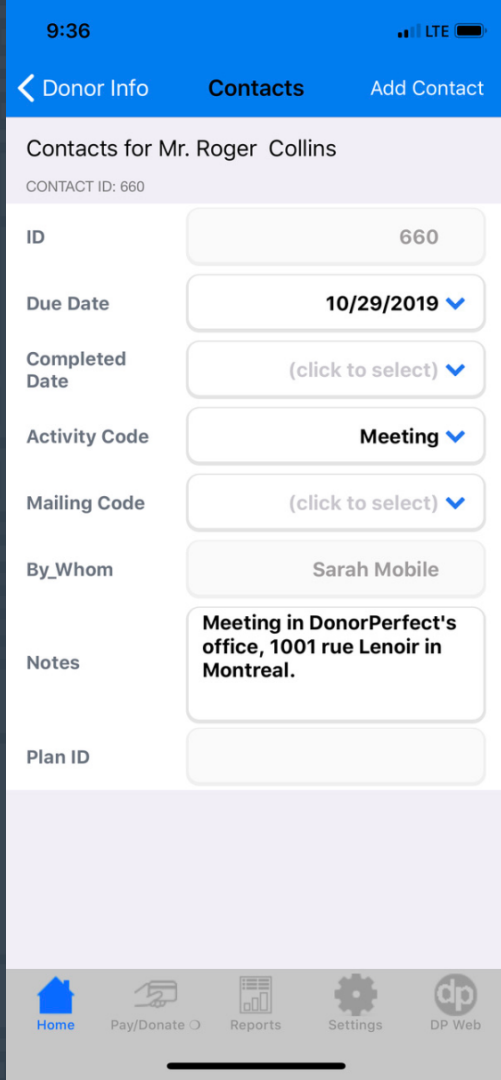
- Save to do items in iCalendar, Google, Outlook or Yahoo
- View short-term to-do list on User Dashboard
- Run reports for any future deadlines or completed tasks from Report Center

The screenshot displays the 'Contact Manager' interface. At the top left, there is a '+ Add contact' button. A dropdown menu is open, showing options for adding contacts from Apple, Google (online), Outlook, and Outlook.com (online). Below this, a table shows a list of contacts with columns for 'Contact/Entry Date', 'Assigned To', and 'Due Date'. The table contains two rows of data.

Contact/Entry Date	Assigned To	Due Date
09/25/2019	Sarah Lalonde	10/28/2019
09/25/2019	Sarah Lalonde	

Below the table, there is a section titled 'OPEN CONTACTS' with a sub-header 'Total Records'. A note states: 'This section shows up to 100 open contacts that are either overdue or scheduled for the next 7 days.' Below this note is a table listing open contacts with columns for 'Name', 'Due Date', and 'Activity'.

Name	Due Date	Activity
Albertine Alonso (50)	10/24/2019	Telephone Call
Dick Grayson (26)	10/24/2019	1 - Grant Inquiry
Donald Duck (4)	10/26/2019	Visit
Brad Pitt (21)	10/27/2019	Visit
Kara Zor-L (44)	10/28/2019	Letter
Amélie Gauthier (184)	10/28/2019	Telephone Call
Luke Cage (23)	10/28/2019	Meeting
Peter Parker (20)	10/29/2019	Grant Proposal



DP Mobile

- Create and Edit Contacts on the go with the app
- Dictate to your phone!
- Upcoming Contacts Report



DonorPerfect Payment Platform

A single payment account that's built *for all*
the ways you fundraise!

DonorPerfect Payment Services

Save time

Every transaction processed is automatically reflected in the appropriate donor record in DonorPerfect.



You're already approved

Activate your account by completing our online activation process.

Offer options

Accept all major forms of payment. Visa, MasterCard, American Express, and preauthorized banking.

Save money

Enjoy the ease of integrated payment processing at a low rate.

Insta-Charge



- Process credit card donations and bank account withdrawals in real time, via phone, mail, or in-person.
- Perfect for one-time transactions, this integrated tool minimizes data entry and instantly confirms the transaction in the donor's record.



Monthly Giving and Account Updater

Monthly Giving



Monthly Giving

- Create the Pledges
- Manual or Automatic
- Enter Email Address (es)
- Automatic Process runs every day at 5AM EST
- Receive email when transactions are processed
- Must handle failed transactions

Pledge Details [How to close out a pledge](#)

* Date of Pledge	10/08/2019	* Start Date	10/15/2019	Pledge ID #	1208
Total	\$0.00	Billing Amount	\$80.00	Total Paid	\$0.00
* Frequency	Monthly	* General Ledger	Monthly Donors	Balance Due	\$0.00
* Solicitation	Unsolicited	Sub Solicitation		Delinquent Amount	\$80.00
Solicitor - Pledge		Qty / Number Attending - P			
Thank-You Letter	99 - Consolidated Receipt				
Associated Address	MAIN - Sarah Lalonde / 665 Wright / Dorval, QC H9P 2C4 CA				
Pledge Memo					
Write-off Amount	\$0.00	Write-off Date		Reminder?	<input checked="" type="checkbox"/>
Last Paid Date		Last Date Billed			

Monthly Giving

If Payment method is bank preauthorized: Country and Home Phone are mandatory.
Make sure Receiving Preference is Consolidated on Main screen and Thank-you letter is assigned.

Monthly Giving: Yes * Currency: Canadian Dollar * Payment Method: Visa (x1111)

Monthly Giving: Batch 12

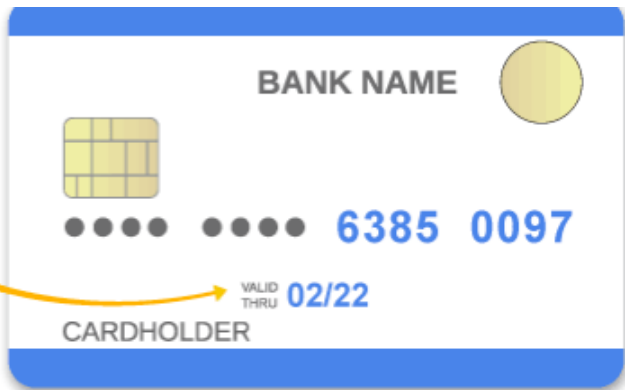
Attempted \$13,375.00 93 transactions	Successful \$13,375.00 93 transactions	Failed \$0.00 0 transactions
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Payments processed: **Credit cards and bank accounts**
Submitted: **10/15/2019 at 04:33 AM**

Account Updater

Nonprofits who use DonorPerfect's Account Updater have seen as much as a 31% increase in successful monthly giving collection.

AUTO UPDATE!!





SmartActions

Definition

A result that happens in the database when a specific situation occurs

- ❑ You need a **Trigger**
- ❑ You need a **Filter**
- ❑ You need to **Create the Action**

donorperfect Log out: Sarah

Quick Search Advanced Search

HOME ADD NEW RECEIPTS BIRTHDAYS REPORTS TASKS UTILITIES APPROVALS

Add New SmartAction

Show: Active All

SmartAction Name	Trigger	Active	Filter Applied	Created By	Created Date	Modified Date		
1 - Major Gift - Stewardship	New Gift Save	✓	✓	james_mamm_dpc	06/14/2017	10/17/2018		
2 - Canvasser email notification	New Gift Save	✓	✓	dpcanada01AdminDPO	10/17/2018			
3 - Data Entry Control	Any Gift Save	✓	✓	dpcanada01AdminDPO	10/17/2018	10/17/2018		
4 - Data Entry Control: credit card not processed	Any Gift Save	✓	✓	dpcanada01AdminDPO	10/17/2018	10/17/2018		
5 - Gift deleted	Gift Delete	✓		dpcanada01AdminDPO	10/17/2018			
7 - Launch a website and perform a search	Any Constituent Save	✓	✓	dpcanada01AdminDPO	10/12/2018	10/12/2018		
8 - Platinum Sponsorship	New Other Info Save	✓	✓	dpc3_si	10/12/2018	10/17/2018		
Board Member Email Reminder	New Contact Save	✓	✓	dpcanada01AdminDPO	11/24/2017	11/24/2017		
No mail checked without reason	Any Constituent Save	✓	✓	james_mamm_dpc	12/03/2013	07/24/2017		

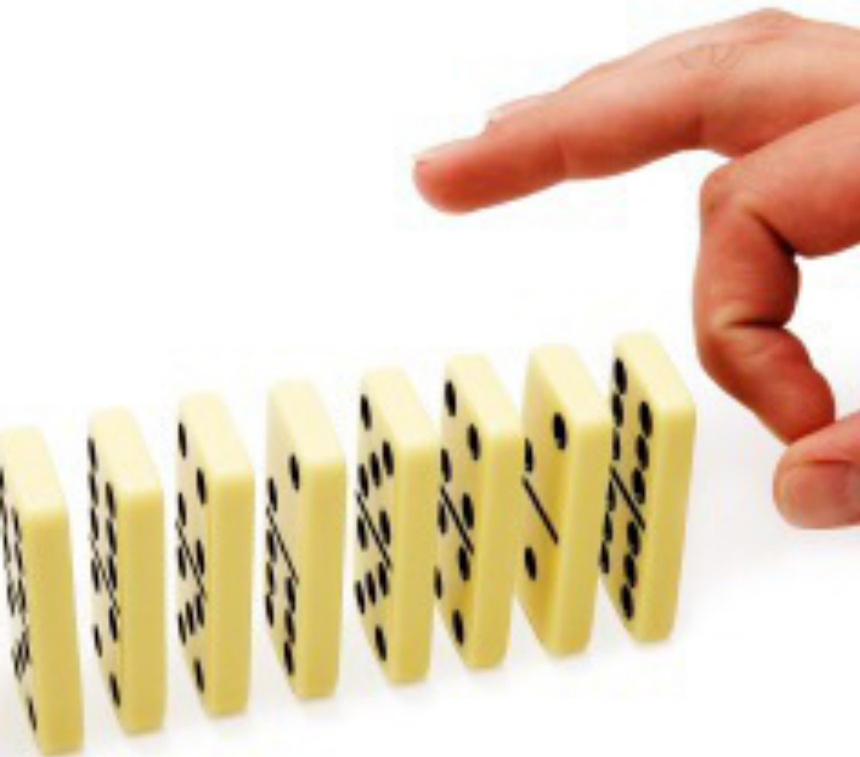
Total Records: 9

Triggers

Load a page

Save a new or existing record

Delete a record





Actions

Send an email

Display popup

Create transaction

Update field

Launch Website

SmartActions



- Immediate email sent to a director when a major gift is saved
- Display pop-up to remind the user to fill in a field
- Send an email to Finance when a gift is deleted

What's Next ?



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.

DPC3

DONORPERFECT CANADIAN CLIENT CONFERENCE