

# PROADVISOR review

## *Donor Perfect Fundraising Software by Softerware*

Overall Rating **9.03**

### Product Name

Donor Perfect Fundraising Software by Softerware

### Reviewed By

Leslie Hamm

### Date Reviewed

October 31, 2005

### Summary

Donor Perfect is a great solution for tracking, processing and analyzing in depth donor and fundraising information.

### Strengths

Donor Perfect is scaleable and easy to use. Training for volunteers will be a snap. PC based or web based application available. The software will be useful for both 501c3 and 501c6 organizations.

### Limitations

Donor Perfect is not intended as a replacement for your current accounting software and its focus on donor, volunteer and fundraising functions is really designed to work with an organization's financial accounting software. Since DonorPerfect provides its own pledge reminders, it also does not import pledges as an invoice.

### Wish List

DonorPerfect posts donation transactions to QuickBooks by general ledger code, but the ability to class donations and pledges would be advantageous.

Product Ratings	Rating
<p><b>Setup and Installation:</b> Installation of the software is straightforward. Set up will involve either importing a customer (donor) list using the products import utility or the vendor can provide more sophisticated data clean-up such as merging files, address correction and import a full history of customer donations for a fee. The user has the ability to set up and edit the general ledger interface to QuickBooks very easily.</p>	9.0
<p><b>Interface:</b> Donor Perfect is easy to navigate and it can be customized to suit the needs of the end user. The input screens are very simple to learn to use, this will be a great timesaver for staff training.</p>	9.5
<p><b>Features:</b> Donor Perfect provides a highly customizable ability to track complete information on your constituents including donors, volunteers, members, special event participants, etc. In addition it allows you to keep a detailed history of gifts and pledges and quickly see this giving history (including yearly totals for 5 years, largest gift, etc). DonorPerfect also provides a very complete assortment of capabilities to support a non-profits fundraising efforts including:</p> <ul style="list-style-type: none"> <li>• Producing thank you letters for each donation or pledge as well as a year end summary of giving letters to be generated directly from within Donor Perfect. You can even specify which of your donor recognition letters should be used as you enter each gift and then print all the personalized thank you letters at once.</li> <li>• Ability to export constituent data into Microsoft Word mail merges or to a file for a mail house and automatically track these direct mail efforts as part of each donors contact history.</li> <li>• Ability to Insta-merge individual letters or e-mails as well as a very useful broadcast email export utility.</li> <li>• Automatic links on a donor’s record for Google and Map Quest.</li> <li>• Ability to store a picture of a donor</li> <li>• Useful reports to analyze donor giving such as donors that gave “Last year but not this year”</li> <li>• Specialized features for fundraising such as the ability to “soft credit” gifts such as memorials, honorariums, and matching gifts.</li> </ul>	7.9

**Ratings Definitions**

- 10.0 (Perfect):**  
This is a very rare score is reserved for a product that is as perfect as it could be.
- 9.0 to 9.9 (Spectacular):**  
A product that receives a rating in this range succeeds at meeting all of its intended users’ needs and has no major drawbacks.
- 8.0 to 8.9 (Excellent):**  
A product that receives a rating in this range is superior in so many ways that its few drawbacks do not have much negative impact.
- 7.0 to 7.9 (Very good):**  
While the strengths of a product scoring in this range certainly outweigh its weaknesses, it has some minor faults that users should be aware of.
- 6.0 to 6.9 (Good):**  
This range represents a product that is above average. Its strengths outweigh its weaknesses, making it good for most uses but not a standout.
- 5.0 to 5.9 (Average):**  
A product that scores in this range is functional but unremarkable.
- 4.0 to 4.9 (Mediocre):**  
Products in this range are below average. They fall in the middle of the pack for most features, but suffer from a few additional major flaws.
- 3.0 to 3.9 (Poor):**  
A customer should probably not consider purchasing a product in this range or lower. There may be one or two specialized circumstances, however, that could justify the purchase of this product for a very low price for a specific demand.



<ul style="list-style-type: none"><li>• Integrated tools for donation collection by credit card including online donations and preauthorized recurring pledges.</li><li>• Complete grant management tracking</li><li>• Tools for major donor contact management, special events, membership and even volunteer without the need to purchase separate software.</li><li>• Report export to Excel, Word, PDF and BMP files gives you real time data in the format you need.</li></ul>	
<p><b>Follow-through on Claims</b></p> <p>Donor Perfect does more than it claims on the QuickBooks Solutions Marketplace. The transactions can be imported in detail, not just summary. Otherwise, Donor Perfect performs just as described in the synopsis on the QuickBooks Marketplace website.</p>	<b>9.5</b>
<p><b>Ease of Use/Service and Support</b></p> <p>The product is very easy to use. The screens can be customized to suit the customer's needs. The interface with QuickBooks lacks the ability to use classes but otherwise the auto transaction import works well. Donor Perfect PC version is sold as a one time license based on number of workstations and there are two types of annual support plans are available as well as training via, phone, Webinar or in person. The price of the support plans is driven by the response time expected to a support request, as little as 2 hours or up to 24hours at maximum turnaround. Support staff was very helpful and responsive.</p>	<b>8.5</b>
<p><b>Data Security</b></p> <p>The data is password protected and individual user rights can be established to further restrict access to the data and software functions.</p>	<b>10.0</b>
<p><b>Privacy</b></p> <p>The product has a stated privacy policy that creates confidence that the customer's information will be protected.</p>	<b>10.0</b>
<p><b>Integration with QuickBooks</b></p> <p>Donor Perfect exports not only donation receipts but pledge accounts receivable into QuickBooks. It can replace QuickBooks for the customer and revenue functions for most companies while maintaining the other accounting functions in QuickBooks. The additional donor information and vast number of customizable reports will greatly improve ability your organization's ability to target donors for follow-up as well as facilitate fundraising analysis. Very smooth information importing into QuickBooks either using auto transaction or import feature. One drawback is</p>	<b>7.8</b>



**QuickBooks®**

**PROADVISOR**

---

the import of accounting transactions does not provide a restriction on reposting the same date range which could cause an over statement on the financials. At this time class tracking is not available as a part of the import.

---

