

GiftWorks®

What's new in GiftWorks 2011?

If you are upgrading from **GiftWorks 2006**, then read about what's new in GiftWorks 2011 starting on [Page 2](#).

If you are upgrading from **GiftWorks 2008**, then read about what's new in GiftWorks 2011 starting on [Page 11](#).

If you are upgrading from **GiftWorks 2010**, then read about what's new in GiftWorks 2011 starting on [Page 20](#).

Upgrading From GiftWorks 2006

What's New in GiftWorks 2011

Congratulations on your purchase of GiftWorks 2011. The tools that you need for donor and donation management are all right where you need them with GiftWorks. You can put your information to work for you with GiftWorks 2011 Standard or GiftWorks 2011 Premium.

GiftWorks 2011 Standard is the next generation of GiftWorks. We've made many changes and improvements in this new version that will make your GiftWorks experience even better.

GiftWorks 2011 Premium builds on the new features of GiftWorks 2011 Standard and offers several enhanced tools and capabilities. The new features in GiftWorks 2011 Premium include:

- Customizable user security
- Seasonal address management
- Additional custom fields
- Discounted mailing support

Reading through this guide will help you understand how important features have been changed and improved from previous versions of GiftWorks, and will help you get up to speed with the new version as quickly as possible.

Changes to Donors

The primary change in GiftWorks 2011 is in the structure of donors and the relationships between donors, other donors, households and organizations. In earlier versions of GiftWorks, donors had to be designated as either Individuals or Organizations. There were separate types of SmartLists for each type. Individuals could be linked to a Household, which provided some limited ability to address the household member donors as a single unit. It was not possible to directly attribute a donation to a household: the donation had to be input as from one of the household members “on behalf of” the household. It was not possible to create a SmartList of households, nor was it possible to accurately report on donations from households. Each household member and organization contact had to be entered into GiftWorks as an individual, which resulted in inflated donor counts (for example, a household with 3 members would appear in your donor count as 3 donors, even if you only ever dealt with the household as a single unit). Although GiftWorks made it easy to track information about separate household members individually, it provided only limited ways to deal with a household as a single unit.

GiftWorks 2011 Standard provides a new structure for donors, households, organizations and for the relationships between those entities, as detailed below. All Donors now contain the same fields for storing information and can be retrieved in the same SmartList.

Also new in GiftWorks 2011 Standard are Donor Profiles. When adding a donor, you can choose between a Donor with no profile, Donor with a Household profile, or Donor with an Organization profile. Each of the profiles includes the same fields, but choosing an Organization or Household profile gives you a visual clue as to the type of donor and also provides access to some features specific to that type of donor (for example an “Add Household Member” link for Household profiles).



Households

When adding a Household, you can enter all of the information about the household members into one Donor (with or without the Household profile). If you do not need to track any individual information about any of the household members, but deal with them only as a couple (John and Mary Smith) or as a family (The Smiths) for solicitation and donation purposes, you need only create the one Donor to represent the entire household. If you want or need to track information about one or more members of the household, you can create household member records for them, optionally as Affiliate donors (see below). Donations can be directly attributed to the Household, and households are returned along with all other donors when you create a SmartList (assuming they meet the criteria that you set for the SmartList).

Organizations

When adding an Organization, you can enter all of the information for the organization and its primary contact into one record (assuming that you do not plan to communicate with the contact in any other capacity than as the organization’s contact). If you do need to communicate with the contact separately, you can create a donor for the contact and link it to the Organization donor. If you don’t need to communicate with the contact separately, but would like to track information on

the contact separately from the Organization, you can create a donor for the contact, link it to the organization and designate it as an Affiliate (see below).

Some of the Organization fields from earlier versions of GiftWorks have been removed from GiftWorks 2011 Standard. They are:

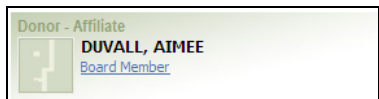
- Number of employees
- Region
- Industry
- Annual Revenue
- EIN
- Acronym
- Relationship

Any data you have stored in these fields will not be available after you complete the database upgrade process, except that you will have the option during the upgrade of copying the Relationship information to a custom field.

The ability to specify a Parent-Branch relationship between organizations has also been eliminated. Any such relationships will be removed by the upgrade process.

Affiliate Donors

Another new feature of GiftWorks 2011 is the ability to designate any donor as an Affiliate. Doing so lets you track information about that donor without including the donor in donor counts, SmartLists, reports or mailings. You always have the option of explicitly including Affiliates using SmartList criteria, but by default they are not included. Affiliate donors can be used for household members, organization contacts, and for other community members whose information you want to track but whom you don't intend to solicit and from whom you don't expect to receive donations. If you decide that you do want to add an Affiliate to your regular pool of donors, or if you receive a donation from an Affiliate, you can always remove the Affiliate designation and thereby convert the Affiliate to a regular donor.



PREMIUM

Seasonal Addresses

GiftWorks has always allowed you to enter multiple addresses for every donor. GiftWorks 2011 Premium now adds the ability to set recurring Seasonal Addresses for each donor. The seasonal addresses automatically are used as the current mailing addresses during the specified, active time period for each seasonal address.

You can add multiple seasonal addresses per donor, giving you full control over where to send mail throughout the year. The active time periods for a donor's seasonal addresses cannot overlap.

GiftWorks 2011 Premium automatically updates donor mailing addresses every day when you sign in to GiftWorks. If a donor has a seasonal address, GiftWorks 2011 Premium sets the current mailing address during the daily update for those donors whose seasonal addresses are active on that day. The automatic update is brief and no other users will be able to sign in to GiftWorks 2011 Premium until the update is complete.

A seasonal address update may be run manually from the Database and Maintenance area of the Settings section.

GiftWorks 2011 Premium also includes a new Donor Addresses Report. GiftWorks automatically updates Donor addresses in the report and indicates which donor addresses are the current mailing addresses. Using the filter options, the report can be modified to include primary, seasonal and informational addresses.

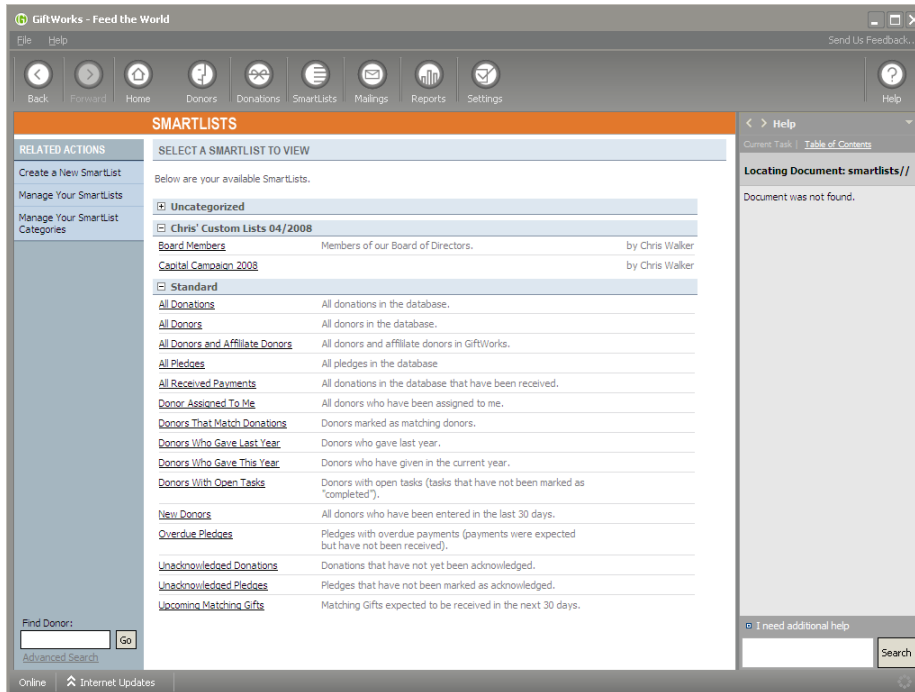
SmartLists

In previous versions of GiftWorks, it was necessary to create separate SmartLists for Organizations and Individuals, which made it difficult to send one mailing to donors of both types, amongst other problems. In GiftWorks 2011 Standard, there is a single type of SmartList (Donors) that encompasses both Individuals and Organizations.

Another new SmartList feature for donor SmartLists is the ability to specify up to four custom time periods and then show total giving per donor during each time period and/or use that total giving per donor as a SmartList criteria. This can be helpful for comparing donor giving year-over-year, for example.

Display Name	Address	City, State	Phone
Alota, Mark	585 Bryant Street	San Francisco, CA	
Arm, Mark	1471 Bancroft Ave,	Berkeley, CA	
Barber, Harry	1000 Van Ness Ave.	San Francisco, CA	(415) 67-
Batinich Household	730 Ellis Street	San Francisco, CA	(415) 56;
Batinich, Dave	730 Ellis Street	San Francisco, CA	(415) 56;
Batinich, Sharron	730 Ellis Street	San Francisco, CA	(415) 56;
Bell, Ethel	470 Third St. W.	Sonoma, CA	

We have also added the ability to place SmartLists into categories, which makes it easier to keep your SmartLists organized, particularly if you have a large number of them.

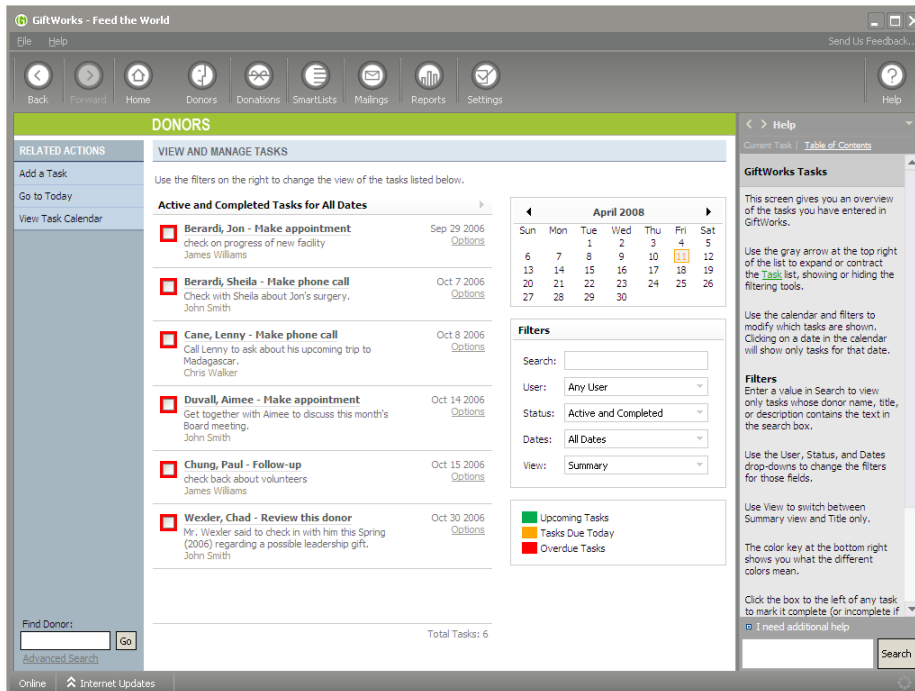


Donor Groups

In GiftWorks 2011 Standard, you can use multiple groups as SmartList criteria (for example "Show donors whose: group is 'Member' and whose: group is 'Gold Sponsors'"). This example SmartList criteria would show those donors who are in both the Member group and in the Gold Sponsors group. This was not previously possible. You can also now show which groups a donor is in as a column in SmartList results or in reports.

Tasks

GiftWorks 2011 Standard lets GiftWorks users view and edit tasks assigned to any other user. The new View and Manage Tasks screen gives you a filterable view of all the tasks in the system. Using this view makes it easy to get an overview of all of the activity going on between your staff and donors.



Reports

Several new reports have been added to GiftWorks 2011. Be sure to check out all the new reports to see how they can help you better understand your GiftWorks information.

Other report improvements include the ability to view reports based on calendar or fiscal year, pie chart views for additional reports, and the ability to choose reporting options before a report is run and to more closely control the options for reports.

Mailings

GiftWorks 2011 Standard now includes several improvements to the Mailing Center. A spelling checker is now available in the letter editor. You have additional new flexibility in formatting envelopes and labels, including being able to specify color, font type, style and size, and more. You can now specify both primary and secondary sorting when creating a mailing, which can ensure consistency when generating multiple mailings. New printing and saving options allow you to control how you produce and save mailings, which can help with customizing individual letters and with saving or printing large mailings. For example, if your need to load special paper to print your letters, you can send the letters to the printer one at a time instead of just in one big batch.

PREMIUM

Discounted Mailing Options

The Mailing Center can now assist GiftWorks 2011 Premium users in producing USPS discounted mailings by automatically sorting addresses, printing tray labels, and printing the mailing details to complete required postage documentation for your mailings. The additional automatic sorting for mailings by GiftWorks 2011 Premium can help you save postage expenses and time.

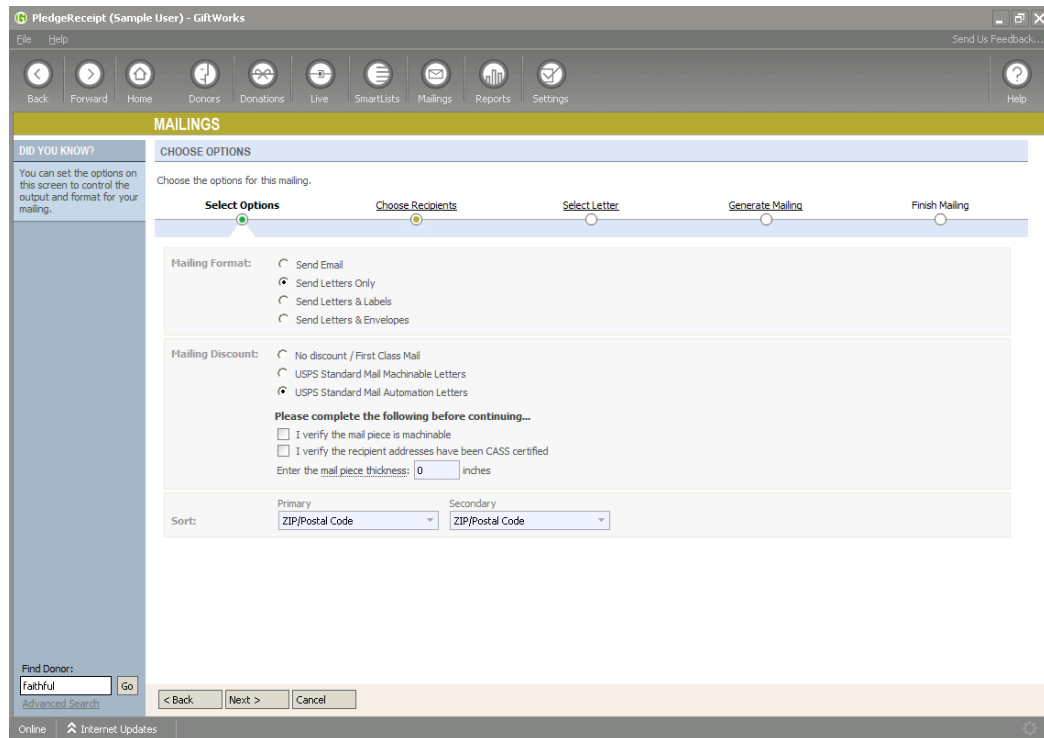
USPS discounted mailings are mailings that have more than 200 pieces and meet weight, shape and size standards to qualify for discounted rates.

GiftWorks 2011 Premium assists in generating Standard Mail Machinable letters and Standard Mail Automation letters. Automation discounted mailings include the correct

barcodes for each address. Nonprofits authorized by the Postal Service are eligible for additional savings on Standard Mail rates.

Before creating your first discounted mailing, enter your Mailer Information in Change Your Organization Information in the Settings area. The Post Office City, State and ZIP/Postal Code refer to the post office from where you send your mailings. Check Sectional Center Facility if the Post Office from where you drop off your mailings is a SFC. Enter your mailing fee expiration date, and GiftWorks will remind you of the pending expiration in the Reminders area of your Home Page.

Refer to the GiftWorks 2011 Mailing Center Guide for tips, checklists and how-to's on sending USPS discounted mailings.



Customizations

You can now create custom payment types and choose which pieces of information should be entered for each custom payment type. Additional fields are available to be inserted into reports and letters and to be used as SmartList criteria. We have added the ability to print out the values contained in any customizable list. You can also customize the start page of GiftWorks to include different reports and other information – you can set it up however is most useful for you.

Additional Batch Updating Options

You can now apply more updates to all of the items in a donor, donation or pledge SmartList, including membership renewal dates, campaigns, funds, appeals and removing donors from groups.

Internationalization

GiftWorks now works with the regional settings on your computer to determine the date format and currency to use. GiftWorks also provides significantly improved support for international addresses and phone numbers.

PREMIUM

Security Levels

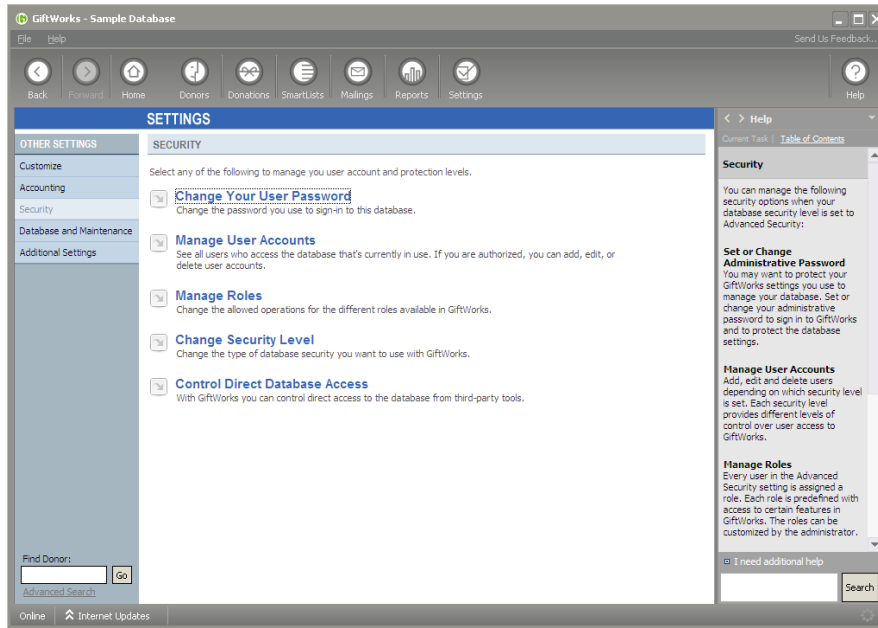
GiftWorks 2011 Premium features a significant change in the database security levels available. In GiftWorks 2011 Premium you can increase or decrease your security level to best meet your database security needs. All GiftWorks databases are initially set at the Basic Security level.

- **Basic Security:** Any user is allowed to sign in to use the GiftWorks database. The user name is used to track history as information is added or changed in the database. The Settings area can be protected by an Administrative Password and users are prompted for the password to enter Settings. Users still have access to all other areas of the database. This is the same level of security that exists in older versions of GiftWorks.
- **Standard Security:** Only users created by the database administrator can sign in to use GiftWorks. Passwords are required by all users to sign in. Any user can be designated as an administrator and the administrator may modify settings. All users have access to all other areas of the software. The administrator can also change the user role, add and delete user accounts, change the user name, and activate/disable user accounts.
- **Advanced Security:** Each user is also assigned a role and which features in GiftWorks the user in that role can access. Users are assigned to the Guest, User, Manager or Administrator roles. Each role is predefined, but may be customized by the administrator.

GiftWorks 2011 Premium administrators can also **Manage User Accounts**. Each security level provides different levels of control over user access to GiftWorks.

- Basic Security allows the administrator to change the names of users.
- Standard Security allows the administrator to set two different levels of user access:
 - Standard User can access all areas of GiftWorks except the administrative options in the Settings section.
 - Administrative users can access to all areas of GiftWorks including settings. Administrators can also change user names, delete user accounts, set user passwords and activate user accounts. Users cannot sign in to GiftWorks 2011 Premium until their user account is activated.
- Advanced Security assigns a role to every user as a Guest, User, Manager or Administrator. Roles are predefined with access to certain areas in GiftWorks 2011 Premium, but they can be fully-customized in the **Manage Roles** area. All users assigned to that role will have the same area access.

For additional information about choosing a database security level, refer to the GiftWorks 2011 Security Guide.



PREMIUM

Additional Custom Fields

GiftWorks 2011 Premium allows you to add up to 3 times as many fields as compared to GiftWorks 2011 Standard and other earlier versions.

Continue reading about what's new in GiftWorks 2011 starting on the next page.

Upgrading From GiftWorks 2006/2008

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The new features in GiftWorks 2011 are available in both GiftWorks Standard and GiftWorks Premium.

(continued on next page)

SmartEntry – the new way to enter donors and donations

You will be able to design and customize your own data entry pages where you can tab through fields quickly and easily. This feature saves data entry time and is a must-have for nonprofits who need to quickly and easily enter donors and donations.

Design your own SmartEntry page – choose the fields you want to use

The screenshot shows the 'SETTINGS' window for 'CREATE A SMARTENTRY PAGE'. The 'Choose Fields' step is active, indicated by a green dot on the progress bar. The interface includes a navigation bar with icons for Back, Forward, Home, Donors, Donations, SmartLists, Mailings, Reports, Settings, and Help. Below the progress bar, instructions state: 'Choose the fields that you would like to include in the SmartEntry page. Click on a field from the Available Fields list and use the Add button to move a field into the SmartEntry Fields list on the right. When you have selected all the desired SmartEntry Fields, click the Next button.' The 'Available Fields' list includes: Donor Fields, Profile, Donor/Affiliate Donor, Prefix, Suffix, Nickname, Display Name, Salutation - Formal, Salutation - Informal, Addressee - Formal, Addressee - Informal, and Description. The 'SmartEntry Fields' list includes: First Name, Middle Name, Last Name, Organization, Donation Date, Fund, Amount, and Payment Type. There are 'Add >' and '< Remove' buttons between the lists. At the bottom, there are '< Back', 'Next >', and 'Cancel' buttons. A search box with 'Find Donor:' and a 'Go' button is also visible.

Design your own SmartEntry page – change the layout

The screenshot shows the 'SETTINGS' window for 'CREATE A SMARTENTRY PAGE'. The 'Design Layout' step is active, indicated by a green dot on the progress bar. The interface includes the same navigation bar as the previous screenshot. Below the progress bar, instructions state: 'Layout the fields for this SmartEntry page. Design the SmartEntry page layout by organizing the fields below. Drag and drop the column headings to change the order of the fields. Click and drag a column heading divider to resize the field. Click the Next button when done. Remember that fields you chose to hide on the Set Defaults page are not visible here.' Below the instructions is a table with the following columns: First Name, Middle Name, Last Name, Organization, Donation Date, and Fund. The table has several empty rows for data entry. At the bottom, there are '< Back', 'Next >', and 'Cancel' buttons. A search box with 'Find Donor:' and a 'Go' button is also visible.

First Name	Middle Name	Last Name	Organization	Donation Date	Fund

Donor Merge

Dealing with donor names and information can inevitably lead to duplicate donors. This feature will enable you to merge duplicate donors so the entire donor history does not have to be re-keyed.

Select the donors to merge

Sample Database (Sample User) - GiftWorks

File Help Send Us Feedback...

Back Forward Home Donors Donations SmartLists Mailings Reports Settings Help

SETTINGS

OTHER SETTINGS

- Customize
- Accounting
- Security
- Database and Maintenance
- Additional Settings & Tools

MERGE TWO DONORS

Merge Overview
When you merge two donors, you select a donor to merge and a donor to keep. Anything associated with the donor to merge, including notes, donations, addresses, phone numbers, etc. is moved to the donor to keep. The donor to merge is permanently deleted from GiftWorks. Prior to merging, you may want to print a report for both donors.

Make a Backup
You can merge any two donors in GiftWorks. You cannot recover what you've merged unless you make a backup, so make sure you **back up** your GiftWorks database before you merge. [Back Up Database](#)

Merge Donors
To merge two donors, select a donor to merge and a donor to keep and click the Merge button.

Donor To Merge	Donor To Keep
<p>Berardi, Sheila Change 1675 Howard Street San Francisco, CA 94103 United States</p> <p>Phone: (415) 863-9000 Email Address: jon@bmwsf.com Full Name: Sheila Berardi Organization: Feed The Nations Profile Info: Donor Donor Added: 8/8/2009 Formal Salutation: Sheila Informal Salutation: Sheila Formal Addressee: Sheila Berardi Informal Addressee: Sheila Berardi Donor Since: 5/12/2007 Total Giving: \$700.00 Total Pledged: \$0.00 Average Donation: \$233.33 Largest Donation: \$400.00</p>	<p>Select Donor</p>

Find Donor: Go [Advanced Search](#)

Merge Cancel

Online [Internet Updates](#)

Enhanced Contact Data

GiftWorks 2011 will allow you to specify secondary and tertiary addresses, phones, and emails for donors and display them in SmartLists and Reports.

Editing an address

Edit Address

Name: Address 1

Street: 131 Fell Street

Suite/Apt:

City: San Francisco State/Province: CA

ZIP/Postal Code: 94102 Country: United States

Delivery Point:

What is the type of address?

Informational Address

Primary Address 2nd Address 3rd Address

Seasonal Address

Will be used as the mailing address during the following time period:

From Month/Day: 0 / 0 To Month/Day: 0 / 0

OK
Cancel

Editing a phone or email

Edit Phone Number

Name: Home Phone

Phone Number: (415) 863-4365

What is the type of phone?

Informational Phone

Primary Phone 2nd Phone 3rd Phone

OK
Cancel

Add Email Address

Name: Information Email

Email Address: info@info.com

What is the type of email?

Informational Email

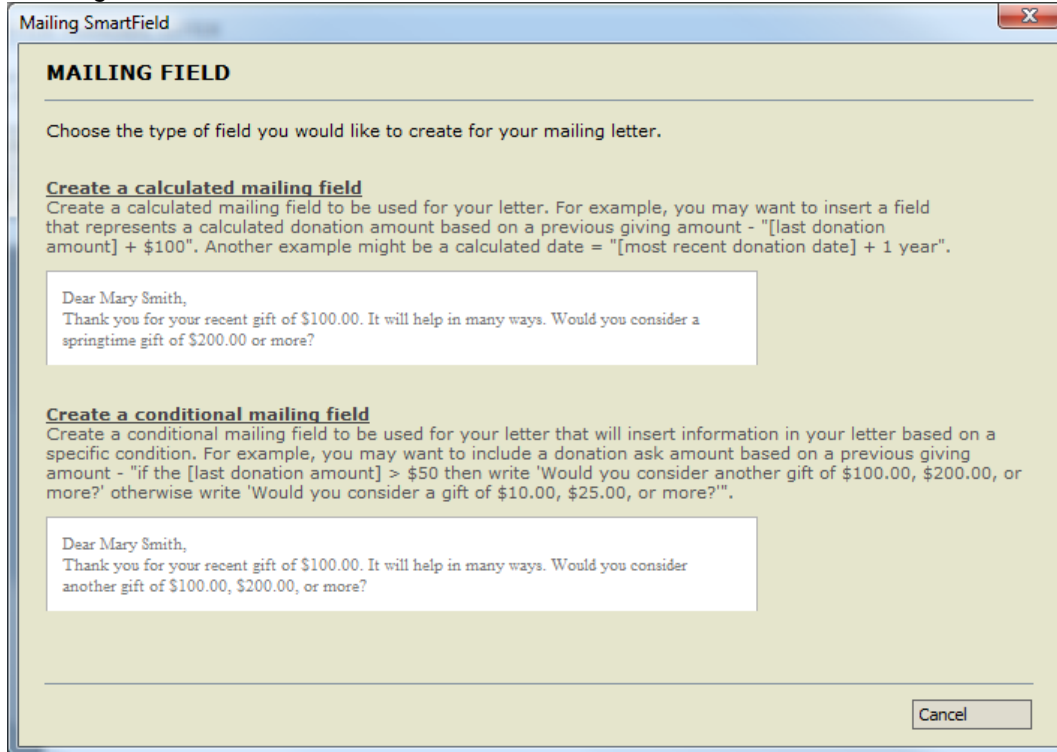
Primary Email 2nd Email 3rd Email

OK
Cancel

SmartFields - Enhanced Mailing Capabilities

GiftWorks 2011 will now give you the tools to create custom calculated fields using new SmartField functionality in mailing letters (i.e. "Last year you donated \$x. Would you consider increasing your gift to [\$x+\$50] this year?"). GiftWorks will also now provide the ability to customize tables that are inserted into letters for donations, pledges and honorariums/memorials. These changes will enable you to create better solicitations and acknowledgements that will quickly lead to more money raised.

Creating a SmartField

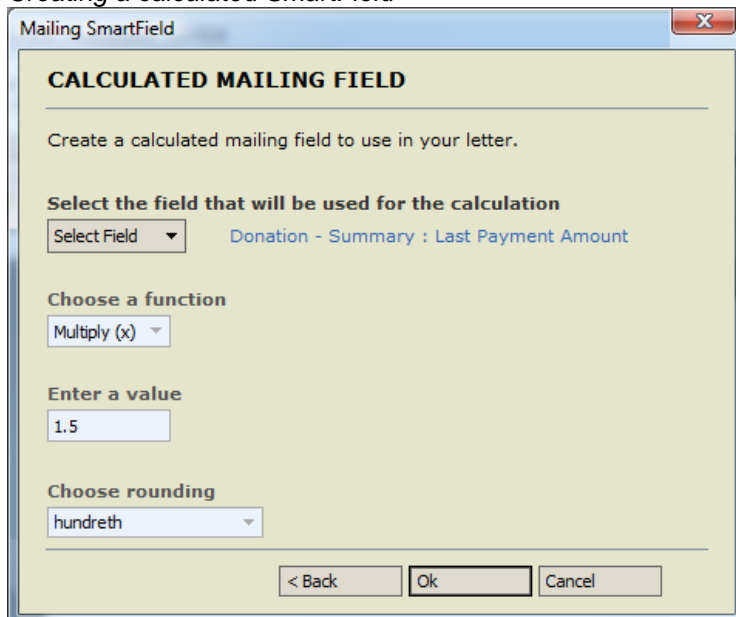


The screenshot shows a dialog box titled "Mailing SmartField" with a close button (X) in the top right corner. The main heading is "MAILING FIELD". Below it, the text reads: "Choose the type of field you would like to create for your mailing letter." There are two options:

- Create a calculated mailing field**: "Create a calculated mailing field to be used for your letter. For example, you may want to insert a field that represents a calculated donation amount based on a previous giving amount - "[last donation amount] + \$100". Another example might be a calculated date = "[most recent donation date] + 1 year"." Below this is a preview box containing the text: "Dear Mary Smith, Thank you for your recent gift of \$100.00. It will help in many ways. Would you consider a springtime gift of \$200.00 or more?"
- Create a conditional mailing field**: "Create a conditional mailing field to be used for your letter that will insert information in your letter based on a specific condition. For example, you may want to include a donation ask amount based on a previous giving amount - "if the [last donation amount] > \$50 then write 'Would you consider another gift of \$100.00, \$200.00, or more?' otherwise write 'Would you consider a gift of \$10.00, \$25.00, or more?'". Below this is a preview box containing the text: "Dear Mary Smith, Thank you for your recent gift of \$100.00. It will help in many ways. Would you consider another gift of \$100.00, \$200.00, or more?"

A "Cancel" button is located at the bottom right of the dialog box.

Creating a calculated SmartField



The screenshot shows a dialog box titled "Mailing SmartField" with a close button (X) in the top right corner. The main heading is "CALCULATED MAILING FIELD". Below it, the text reads: "Create a calculated mailing field to use in your letter." There are three main sections:

- Select the field that will be used for the calculation**: A dropdown menu labeled "Select Field" is set to "Donation - Summary : Last Payment Amount".
- Choose a function**: A dropdown menu labeled "Multiply (x)" is selected.
- Enter a value**: A text input field contains the value "1.5".

Below these sections is a "Choose rounding" dropdown menu set to "hundreth". At the bottom of the dialog box are three buttons: "< Back", "Ok", and "Cancel".

Creating a conditional SmartField

Mailing SmartField X

CONDITIONAL MAILING FIELD

Create a conditional mailing field to use in your letter.

If the following condition is true:

Field: Donation - Summary : Last Payment Amount

Comparison: Value:

Then print:

Text If the condition is true, then print this in the letter:

Field

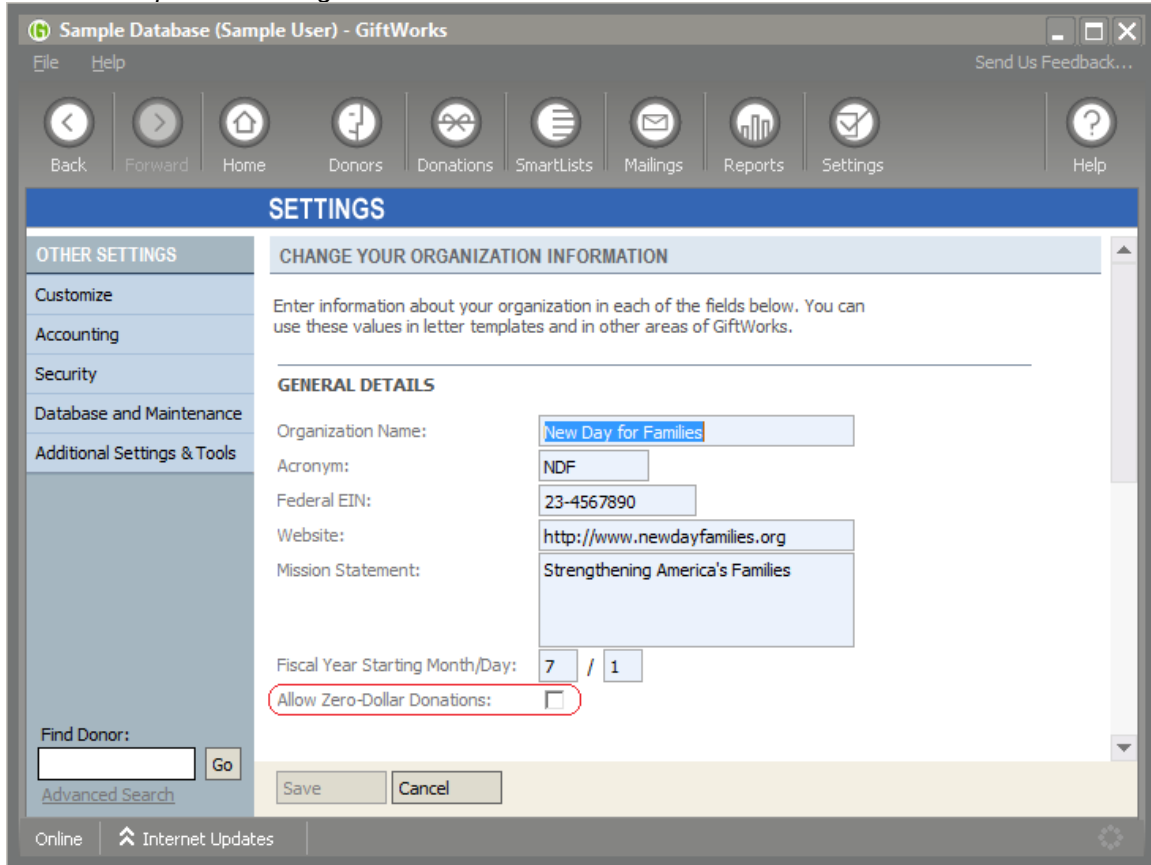
Calculation

Conditional Mailing Field	
If [Last Payment Amount] is between \$0.00 and \$100.00 then print 'Thank you for your gift.'	X
If [Last Payment Amount] is between \$100.00 and \$250.00 then print 'Thank you for your gener...'	X
If [Last Payment Amount] is greater than \$250.00 then print 'Thank you for your very generous gift.'	X

Zero-Dollar Donations

GiftWorks 2011 will now allow donations with a value of \$0, which greatly improves options for managing your in-kind donation program.

Enable the option in Settings

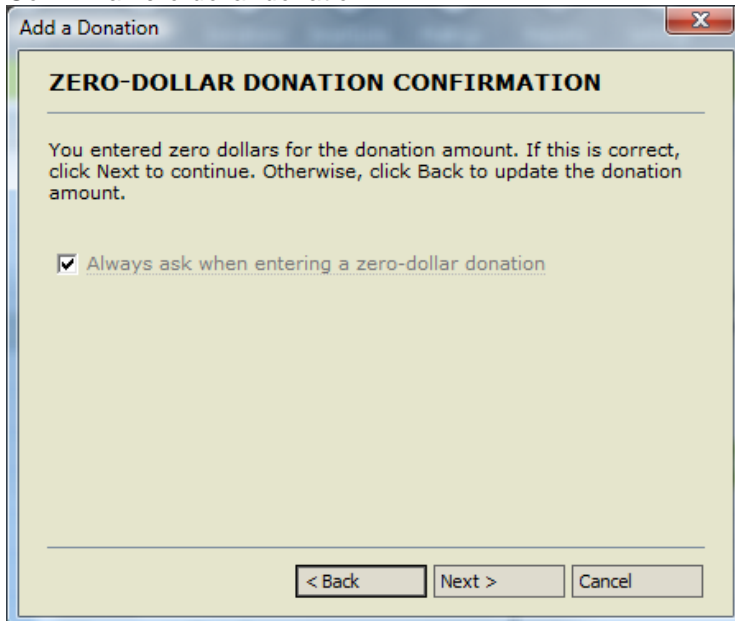


The screenshot shows the 'Settings' page in GiftWorks. The 'OTHER SETTINGS' sidebar on the left includes 'Customize', 'Accounting', 'Security', 'Database and Maintenance', and 'Additional Settings & Tools'. The main content area is titled 'CHANGE YOUR ORGANIZATION INFORMATION' and contains a 'GENERAL DETAILS' section with the following fields:

- Organization Name: New Day for Families
- Acronym: NDF
- Federal EIN: 23-4567890
- Website: http://www.newdayfamilies.org
- Mission Statement: Strengthening America's Families
- Fiscal Year Starting Month/Day: 7 / 1
- Allow Zero-Dollar Donations: (highlighted with a red circle)

At the bottom of the form are 'Save' and 'Cancel' buttons. A 'Find Donor' search box is also visible in the sidebar.

Confirm a zero-dollar donation



The dialog box is titled 'Add a Donation' and contains the following text:

ZERO-DOLLAR DONATION CONFIRMATION

You entered zero dollars for the donation amount. If this is correct, click Next to continue. Otherwise, click Back to update the donation amount.

Always ask when entering a zero-dollar donation

At the bottom of the dialog are three buttons: '< Back', 'Next >', and 'Cancel'.

Improved Import Donor Matching

The current importer matches import information to existing donors using a combination of name information. GiftWorks 2011 will give you the option to choose which field you want to use to match to existing donors in GiftWorks.

Choosing the matching options in the GiftWorks importer

The screenshot shows the 'SETTINGS' page in the GiftWorks application. The page title is 'Sample Database (Sample User) - GiftWorks'. The navigation bar includes 'File', 'Help', and 'Send Us Feedback...'. The main content area is titled 'TELL GIFTWORKS ABOUT YOUR IMPORT FILE'. It contains three sections: 'Creating Donors', 'Creating Household Donors', and 'Updating Existing Donors'. The 'Updating Existing Donors' section is highlighted with a red box. It asks 'How should each row of data be matched to existing donors in GiftWorks?' and offers three options: 'Let GiftWorks decide', 'Choose the fields to use for matching donors', and 'Add a new donor to GiftWorks'. The 'Choose the fields to use for matching donors' option is selected, and it includes two dropdown menus: 'Choose your import field' (set to 'ID') and 'Choose the GiftWorks field' (set to 'Donor Id'). Below these is a question 'If a matching donor is not found, GiftWorks should:' with a dropdown menu set to 'Add a new donor to GiftWorks'. At the bottom, there are 'Find Donor:' and 'Go' buttons, an 'Advanced Search' link, and '< Back', 'Next >', and 'Cancel' buttons. The footer shows 'Online' and 'Internet Updates'.

Sample Database (Sample User) - GiftWorks

File Help Send Us Feedback...

Back Forward Home Donors Donations SmartLists Mailings Reports Settings Help

SETTINGS

TELL GIFTWORKS ABOUT YOUR IMPORT FILE

GiftWorks tracks donors and donations among other things. Check any of the boxes below that apply to the file would like to import, then click Next to continue.

Creating Donors
If the row of data you are importing contains a **first, middle, or last name** and an **organization name**, how should the donor be created?

- Create as a donor without a profile
- Create as a donor with an organization profile

Creating Household Donors
If the row of data you are importing contains both a **donor name** and a **spouse name**, how should GiftWorks import this donor?

- Create a single household donor
- Create a donor and an affiliate spouse record and create a relationship between them

Updating Existing Donors
How should each row of data be matched to existing donors in GiftWorks?

- Let GiftWorks decide
- Choose the fields to use for matching donors
- Add a new donor to GiftWorks

Choose your import field **Choose the GiftWorks field**

ID Donor Id

If a matching donor is not found, GiftWorks should:

Add a new donor to GiftWorks

Find Donor: Go

[Advanced Search](#)

< Back Next > Cancel

Online [Internet Updates](#)

New Update via SmartList Options

New options include changing Donor and Donations Custom Fields, adding Tasks, adding and removing names from Mailing Lists, and changing Donation Amounts.

New SmartList Update options

The screenshot shows the 'Settings' page in the GiftWorks 2011 application. The window title is 'Sample Database (Sample User) - GiftWorks'. The top navigation bar includes icons for Back, Forward, Home, Donors, Donations, SmartLists, Mailings, Reports, and Settings. The main content area is titled 'SETTINGS' and is divided into two columns. The left column, 'RELATED ACTIONS', contains 'Manage SmartList Categories' and 'Update All Items in a SmartList'. The right column, 'Choose an Update', lists 18 update options, including 'Acknowledge donations', 'Add SmartList members to groups', 'Remove SmartList members from groups', 'Add SmartList members to mailing lists', 'Remove SmartList members from mailing lists', 'Change status of SmartList members', 'Change category of SmartList members', 'Change renewal date of SmartList members', 'Change affiliate designation of SmartList members', 'Change profile of SmartList members', 'Change assigned to of SmartList members', 'Change donor custom field value of SmartList members', 'Add note to SmartList members', 'Add task to SmartList members', 'Change campaign for donations/pledges', 'Change appeal for donations/pledges', 'Change fund for donations/pledges', 'Change donation custom field value for donations/pledges', and 'Change amount for received donations'. A 'Description' box on the right contains the text 'Select an option to the left to see a description.' At the bottom of the main content area are buttons for '< Back', 'Next >', and 'Cancel'. The bottom status bar shows 'Online' and 'Internet Updates'.

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What's New in GiftWorks 2011?

Congratulations on your purchase of GiftWorks 2011. The tools that you need for donor and donation management are all right where you need them with GiftWorks. You can put your information to work for you with GiftWorks 2011 Standard or GiftWorks 2011 Premium.

GiftWorks 2011 is the next generation of GiftWorks. We've made many changes and improvements in this new version that will make your GiftWorks experience even better.

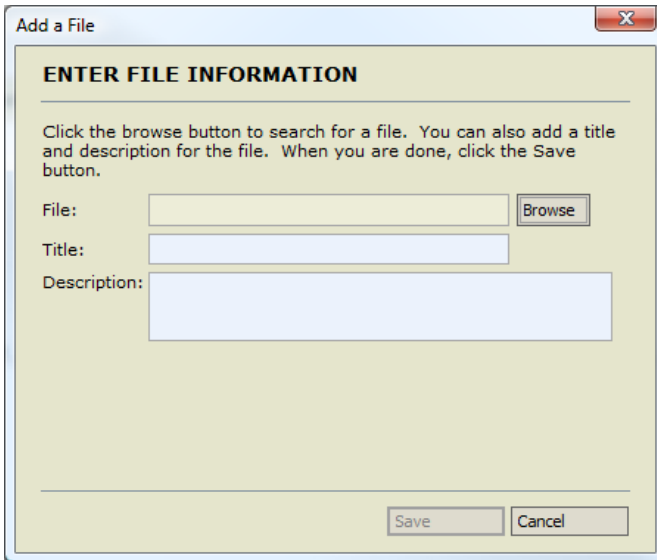
Reading through this guide will help you understand how important features have been changed and improved from previous versions of GiftWorks, and will help you get up to speed with the new version as quickly as possible.

The new features in GiftWorks 2011 are available in both GiftWorks Standard and GiftWorks Premium.

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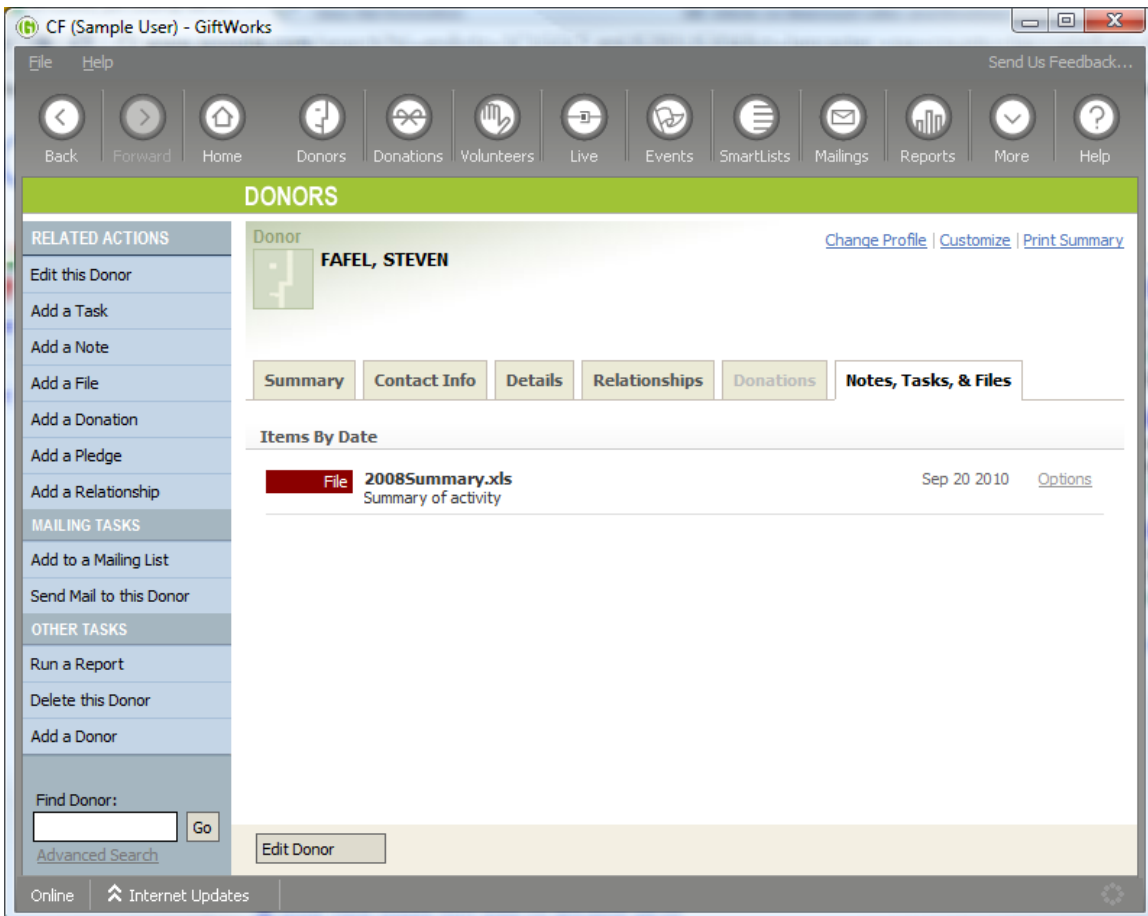
File Attachment – adding files to donors

Attach files to donors in GiftWorks to keep important information easily accessible.



The 'Add a File' dialog box is titled 'Add a File' and contains the following elements:

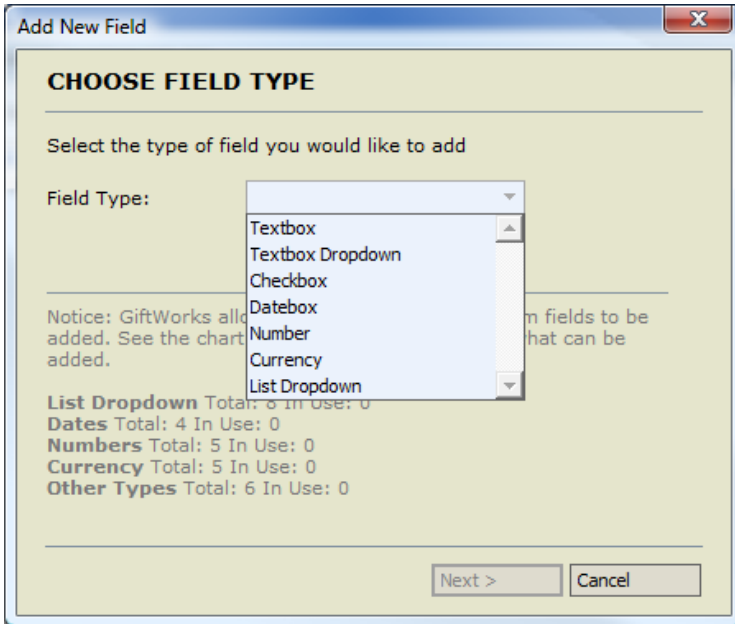
- ENTER FILE INFORMATION** header.
- Instructional text: "Click the browse button to search for a file. You can also add a title and description for the file. When you are done, click the Save button."
- Form fields: "File:" (with a "Browse" button), "Title:", and "Description:" (with a larger text area).
- Buttons: "Save" and "Cancel" at the bottom.



The screenshot shows the GiftWorks application interface for a user named 'CF (Sample User)'. The main navigation bar includes icons for Back, Forward, Home, Donors, Donations, Volunteers, Live, Events, SmartLists, Mailings, Reports, More, and Help. The current view is the 'DONORS' section, specifically the profile for 'Fafel, Steven'. The profile includes a 'Donor' header with links for 'Change Profile', 'Customize', and 'Print Summary'. Below this are tabs for 'Summary', 'Contact Info', 'Details', 'Relationships', 'Donations', and 'Notes, Tasks, & Files'. The 'Notes, Tasks, & Files' tab is active, showing a list of 'Items By Date' with one entry: a file named '2008Summary.xls' dated 'Sep 20 2010'. A left-hand sidebar contains various actions such as 'Edit this Donor', 'Add a Task', 'Add a Note', 'Add a File', 'Add a Donation', 'Add a Pledge', 'Add a Relationship', 'MAILING TASKS', and 'OTHER TASKS'. At the bottom, there is a search bar for 'Find Donor' and an 'Edit Donor' button.

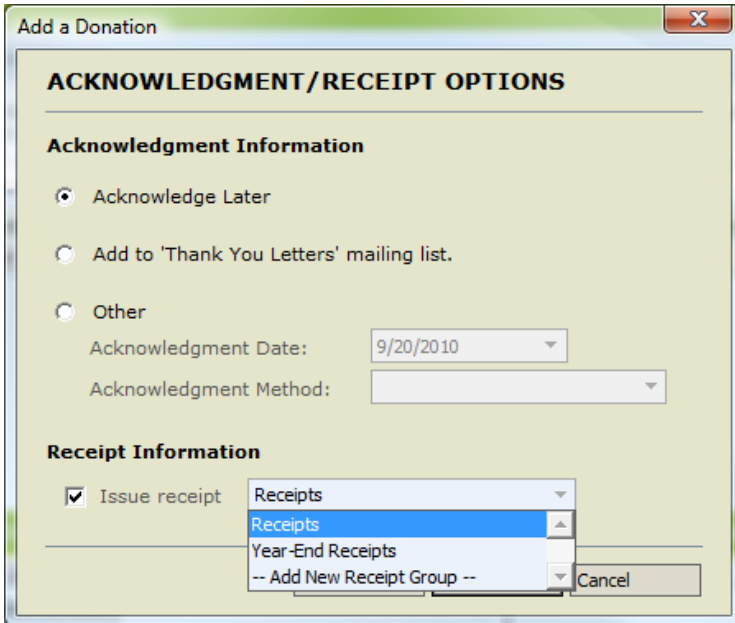
Custom Fields – numbers and currency

GiftWorks now has support for number and currency custom fields for donors and donations.



Improved Receipting – manage receipts got a whole lot better

Year-end receipting and Canadian receipting will all be much easier with GiftWorks 2011, plus overall enhancements to receipting process will give users more control and flexibility.



Donation Receipts Mailing

SELECT DONATIONS TO INCLUDE

Select the options for the receipts you want to create and click Next.

Choose the receipt group

Receipt Group: Year-End Receipts

Select the donation date range

Date Range: All Dates

From:

To:

Next > Cancel

Reports and SmartList Exporting and Emailing – easily share your reports and SmartLists
 Various export formats supported depending on the report type (for example, export graphical reports, such as pie charts, as PDF files). Emailing a report is now as easy as printing or exporting it, right from GiftWorks 2011.

Send Email

SEND EMAIL

Enter the information below and click Send when you are ready to send your email.

Recipient Information

Format: Microsoft Excel

Filename: Donors by SmartList Report.xls

Email Address:

Separate multiple email addresses with a semicolon (:)

Subject: Donors by SmartList Report

Message:

Sender Information

Sender Name:

Sender Address:

Send Cancel

Improved Pledge Payment Handling – more powerful tools to manage pledge payments
Additional options for handling pledge payments that are higher or lower than the amount expected, spanning multiple expected payments. Also, GiftWorks now handles a certain type of “open-ended” pledge.

Apply a Payment

AN ADJUSTMENT IS NEEDED

You entered a payment of: **\$24.00 on 9/20/2010**, which is **\$1.00 less than** the anticipated payment of **\$25.00**.

Choose a method for applying this payment:

- Decrease Total Pledge**
- Create New Payment For Balance**
Accept \$24.00 instead of the expected amount of \$25.00 for this payment, and create a new payment of \$1.00 for the balance.
Expected date for new payment:
- Increase Final Payment**

< Back Next > Cancel

Apply a Payment

AN ADJUSTMENT IS NEEDED

You entered a payment of: **\$26.00 on 9/20/2010**, which is **\$1.00 more than** the anticipated payment of **\$25.00**.

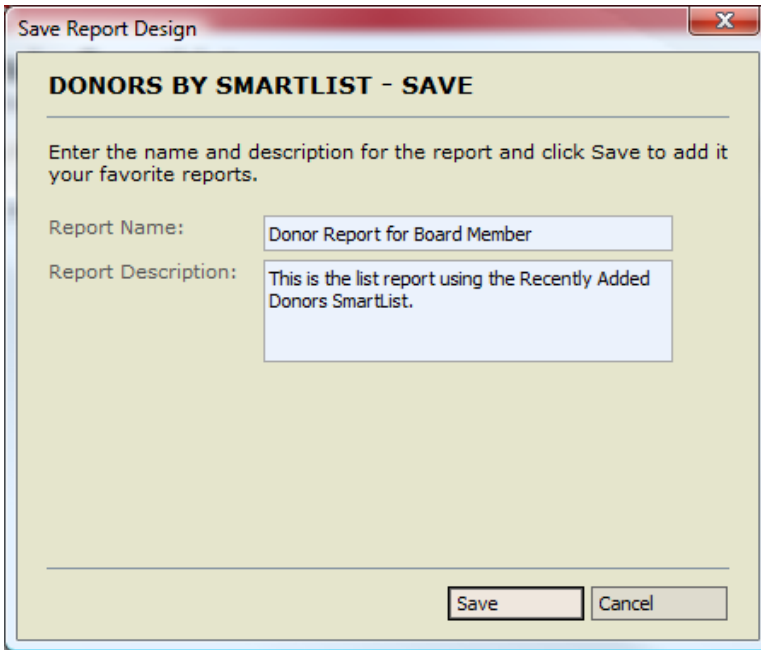
Choose a method for applying this payment:

- Increase Total Pledge**
- Spread Received Amount Across Multiple Payments**
Apply \$25.00 of the received amount to this payment, and apply the remaining \$1.00 across subsequent scheduled payment(s). Additional options will be provided to handle the leftover amount, if any.
- Combine Multiple Scheduled Payments**
- Decrease Final Payment**

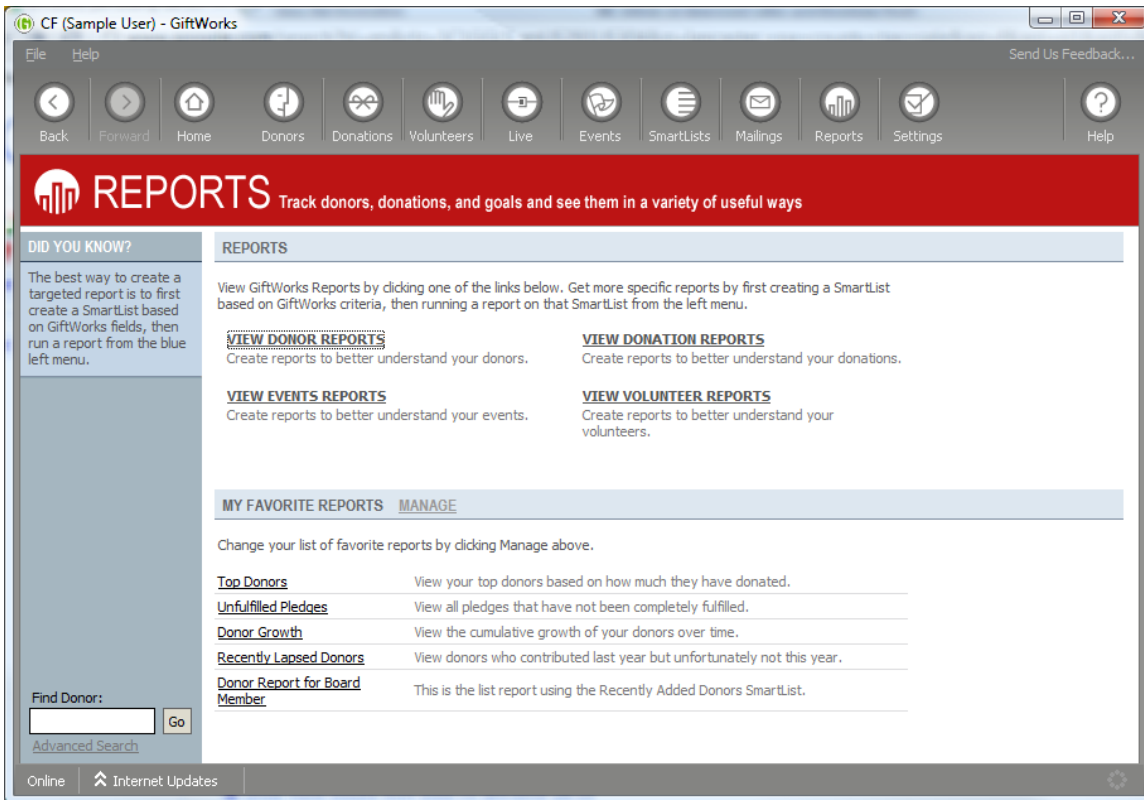
< Back Next > Cancel

Save Report Views – save reports just the way you like them

GiftWorks now includes the ability to name and save specific report format customizations and include them in your list of Favorite Reports.



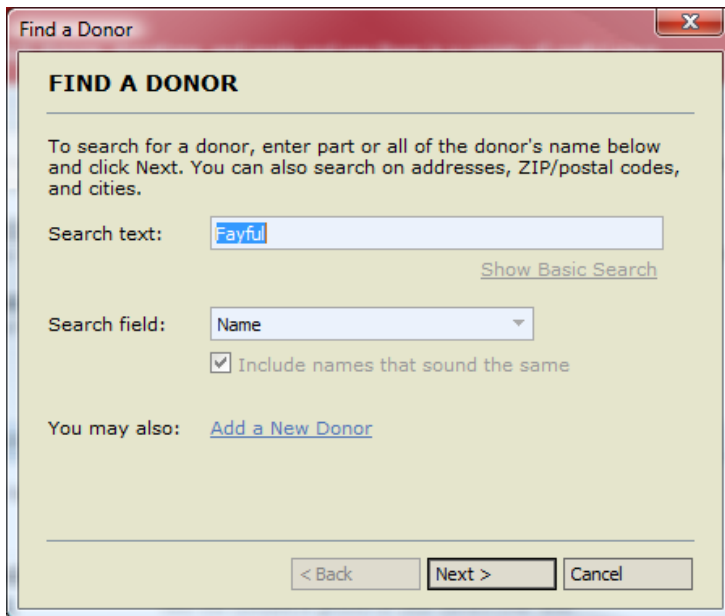
The image shows a 'Save Report Design' dialog box with a title bar containing a close button. The main content area has a heading 'DONORS BY SMARTLIST - SAVE'. Below the heading is a paragraph: 'Enter the name and description for the report and click Save to add it your favorite reports.' There are two input fields: 'Report Name:' with the value 'Donor Report for Board Member' and 'Report Description:' with the value 'This is the list report using the Recently Added Donors SmartList.' At the bottom right, there are two buttons: 'Save' and 'Cancel'.



The image shows the 'GiftWorks' Reports page. The browser title is 'CF (Sample User) - GiftWorks'. The page has a navigation bar with icons for Back, Forward, Home, Donors, Donations, Volunteers, Live, Events, SmartLists, Mailings, Reports, Settings, and Help. Below the navigation bar is a red banner with the word 'REPORTS' and the text 'Track donors, donations, and goals and see them in a variety of useful ways'. The main content area is divided into two columns. The left column has a 'DID YOU KNOW?' section with a tip about creating targeted reports. The right column has a 'REPORTS' section with four links: 'VIEW DONOR REPORTS', 'VIEW DONATION REPORTS', 'VIEW EVENTS REPORTS', and 'VIEW VOLUNTEER REPORTS'. Below this is a 'MY FAVORITE REPORTS' section with a 'MANAGE' link and a list of reports: 'Top Donors', 'Unfulfilled Pledges', 'Donor Growth', 'Recently Lapsed Donors', and 'Donor Report for Board Member'. At the bottom left, there is a 'Find Donor:' search box with a 'Go' button and a link to 'Advanced Search'. The footer contains 'Online' and 'Internet Updates'.

Phonetic Search – find donors with more flexibility

You can now find donors based on how they sound. This will help find donors that were hard to find, improve data entry, and reduce the possibility of entering duplicate donors.



The screenshot shows a window titled "Find a Donor" with a close button (X) in the top right corner. The main heading is "FIND A DONOR". Below the heading, there is a paragraph of instructions: "To search for a donor, enter part or all of the donor's name below and click Next. You can also search on addresses, ZIP/postal codes, and cities." There are two input fields: "Search text:" containing "Fayful" and "Search field:" with a dropdown menu set to "Name". A checkbox labeled "Include names that sound the same" is checked. A link "Show Basic Search" is positioned to the right of the search text field. Below the search fields, there is a link "Add a New Donor". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".



The screenshot shows the same "Find a Donor" window, but now displaying search results. The heading is "SELECT FROM THE MATCHING RESULTS". Below the heading, it says "Searching 'Name' for 'Fayful' returned 1 result." with a link "Options" to the right. A single result is shown in a light blue box: a small green icon, the name "Fafel, Steven" in bold, and "Mr. Steven Fafel" below it. At the bottom, there is a message: "Can't find what you want? [Add a new donor](#) or [Search again](#)". At the very bottom, there are three buttons: "< Back", "Next >", and "Cancel".

Improved Mailing Tools – create letters, envelopes, and labels with more flexibility
New options have been added to improve the creation of letter, envelopes, and labels.

The 'Page Layout' dialog box is titled 'CHANGE PAGE LAYOUT'. It contains the following sections:

- Page Setup:** Paper Size is set to 'Letter (8.5" x 11")' and Layout is set to 'Portrait'.
- Page Margins:** Top: 1, Bottom: 1, Left: 1.25, Right: 1.25.
- Headers and Footers:** Top: 0.5, Bottom: 0.5.
- Apply to all sections of this letter:**

Buttons: Ok, Cancel

The 'Mailing Envelopes' dialog box is titled 'SELECT ENVELOPE TYPE'. It contains the following sections:

- Envelope types:** A list box showing 'Size 9 (3 7/8 x 8 7/8 in)', 'Size 10 (4 1/8 x 9 1/2 in)', 'Size 11 (4 1/2 x 10 3/8 in)', and 'Size 12 (4 3/4 x 11 in)'. 'Size 10' is selected.
- Advanced Envelope Settings:** A link to view more options.
- Address Placement:** A table of settings for Return Address and Mailing Address.
- Reset all envelope settings:** A link to reset settings.

	Top	Left	
Return Address	0.283	0.283	inches
Mailing Address	1.856	3.8	inches

Buttons: Ok, Cancel

Duplicate Donor Finder – find duplicate donors in GiftWorks

Duplicates happen. Use this new tool to identify and manage duplicates quickly and easily.

SETTINGS

FIND DUPLICATE DONORS

Select a maximum of 5 criteria from the list below to use in finding potential duplicate donors. Multiple donors will be considered potential duplicates if ALL selected criteria match exactly.

DONOR NAME INFORMATION

- Display Name
- First Name
- Last Name
- Organization Name

PRIMARY CONTACT INFORMATION

- Address Line 1
- City
- State/Province
- ZIP/Postal Code
- Phone Number
- Email Address

Find Donor: [Advanced Search](#)

SETTINGS

REVIEW DUPLICATE DONORS

Overview

Review the following donors identified as potential duplicates using the criteria you specified. You can select two donors from the list to merge into one donor. When you merge two donors, you select a donor to merge and a donor to keep. Anything associated with the donor to merge, including notes, donations, addresses, phone numbers, etc. is moved to the donor to keep. The donor to merge is permanently deleted from GiftWorks. Prior to merging, you may want to print a report for both donors.

Make a Backup

You can merge any two donors from the list. You cannot recover what you've merged unless you make a backup, so make sure you [back up](#) your GiftWorks database before you merge. [Back Up Database](#)

[Print](#)

Display Name	First Name	Last Name	Organization Name	Address Line 1	City	St...	ZIP/Postal
Tew, Annmarie	Annmarie	Tew		4 Elmhurst Drive	Lancaster	PA	17603
Tew, Grant	Grant	Tew		4 Elmhurst Drive	Lancaster	PA	17603
Tew, Jill	Jill	Tew		4 Elmhurst Drive	Lancaster	PA	17603
The Young Family	Charlie	Young		19 School Drive	Lancaster	PA	17603
Young, Emma	Emma	Young		19 School Drive	Lancaster	PA	17603
Young, Emmaline	Emmaline	Young		19 School Drive	Lancaster	PA	17603

Total Potential Duplicate Donors: 26

Donor To Merge

Donor To Keep

Find Donor: [Advanced Search](#)

More powerful notes – do more with donor notes

Notes will now be searchable and available for inclusion in SmartList criteria.

Find a Donor

FIND A DONOR

To search for a donor, enter part or all of the donor's name below and click Next. You can also search on addresses, ZIP/postal codes, and cities.

Search text: [Show Basic Search](#)

Search field:

You may also: [Add a New Donor](#)

< Back Next > Cancel