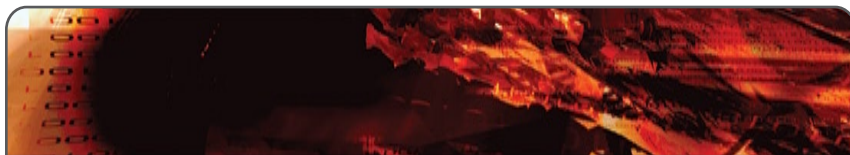


Donor Perfect™

Fundraising Software



**DonorPerfect™ and QuickBooks®
Save Institute Hundreds of Hours
and Thousands of Dollars a Year!**

"I save hundreds of hours a year with this process, and our auditor is also delighted that I can now send him reports aligning information in DonorPerfect with that in QuickBooks. That makes both of our jobs easier."

**Michelle Hinson
Director of Development
Institute for Public Relations**



SUCCESS STORY

**Institute for
Public Relations**

AT A GLANCE:

Organization:

Institute for Public Relations
University of Florida
Gainesville, Florida

Business Challenge:

Too much time manually registering event participants, processing donations and bookkeeping

Solution:

DonorPerfect fundraising software with WebLink custom online forms from SofterWare, and QuickBooks from Intuit.

Results:

- Saved hundreds of hours a year using WebLink to automate event registration and processing payments.
- Bookkeeping time decreased from four days/month to just over 1 day with QuickBooks.
- Increased online donations by over 100%.
- Streamlined accounting process, saving thousands of dollars a year in manpower.
- Eliminated duplicate data entry.
- Electronic records for easier reporting and improved audits.

Customer Profile

Michelle Hinson is the Director of Development for the Institute for Public Relations. In addition to her responsibilities for donor cultivation and special events, she also is responsible for developing new revenue streams, and serves as chief point of contact for the Institute's board of trustees.

Business Challenge

Being a one-woman office, Michelle needed a better way to eliminate manual effort for special event registration, credit card processing and bookkeeping. As Michelle stated, "We were in the dark ages. We desperately needed online event registration and payment processing. And when I started with the Institute in 1995, we kept track of finances on a physical general ledger (thank goodness for erasers) and created reports in Excel and Word. Checks were typed out on a typewriter! I did everything manually - literally having to enter by hand hundreds of registration forms and credit card payments. I was a slave to data entry." Michelle noted that her most precious resource is time, but with these manual processes, she had none left for strategic planning, fundraising and development issues.

Solution

The first financial software Michelle purchased was a QuickBooks competitor's product, and the results were not good. "I was frequently disappointed with the lack of functionality and manageability. I decided to switch to QuickBooks since it has a great reputation and many people told me it was easy to use. It really is - it can make any novice feel like an expert."

Michelle next chose to implement DonorPerfect Online, a web-based donor management solution that she could access anytime, anywhere. Using a hosted solution enabled her to minimize her upfront investment while eliminating the need to manage an IT infrastructure. "Using DonorPerfect, we're able to streamline the event planning side like making name tags and rosters. Plus, the instant receipting function is a dream come true! DonorPerfect has made my fundraising efforts easier and better, from entering records and donation processing, to the powerful reporting and analysis."

The last piece she implemented was WebLink™, also a web-based tool that provides customized online forms linked to their web site. These forms collect data and



process payments, which the Institute uses for both event registrations and online donations. Credit card payments are validated, processed and deposited directly into the Institute's designated bank account. Michelle can easily review completed forms for accuracy, make any necessary changes, and quickly and easily import the data into DonorPerfect.

Key Results

Michelle has enjoyed great success with all three of her technology choices. "Now anyone interested in registering for our programs or donating to us can do it through our web site, and I can download the information directly into DonorPerfect. There is no more duplication of data entry. I save hundreds of hours a year with this process, and our auditor is also delighted that I can now send him reports aligning information in DonorPerfect with that in QuickBooks. That makes both of our jobs easier."

Accounting Made Easy

"QuickBooks has streamlined our entire accounting process - saving us thousands of dollars a year in manpower. Time spent on bookkeeping has decreased from four days a month or more to just over one day a month."

Michelle also mentioned that "Budgeting is now a piece of cake. QuickBooks takes the totals from the previous year and rolls them forward. All I need to do is go in and make adjustments as needed based on our predictions for the year. In addition, the word 'payroll' no longer makes me cry. I used to calculate deductions and taxes on a calculator. End-of-year tasks such as W-2 and 1099 reporting were a complete nightmare for me. QuickBooks has made all of that a thing of the past. Gone are the days when I drafted the budget at home while drinking wine to escape the pain of manual ledgers! Not only has QuickBooks saved us time and money, it has given me peace of mind - and that is priceless!"

Detailed Reporting & Analysis

"The reporting capability of both QuickBooks and DonorPerfect is simply amazing. With a click of a button, you get more information than you can shake a stick at. And the custom report function in DonorPerfect is a dream since it will let you create almost any report imaginable. For example, our auditor was never very impressed with my Excel spreadsheet reports (not to mention my manila folders crammed with registration and payment information). Our constituent data is now stored securely and can be turned into professional looking reports. All of this makes it very easy to reconcile financial information in DonorPerfect with QuickBooks. My auditor no longer dreads seeing me every year, and my Board loves the financial reports I can pull. Since the Board is international in scope, I turn the reports into PDF files and email them from within DonorPerfect."

Online Success

The two main focuses of WebLink for Michelle have been event registrations and online donations, and both have been successful. Said Michelle, "I am happier and less stressed since WebLink came into my office. We're seeing an increase of over 100% in online donations, and I smile now when I think of event registration and payment processing. I no longer have tons of paper registrations and payments strewn everywhere. I feel like I am now in control." She went on to joke, "I didn't start to cry when I was told we would hold two more events this year. That's a major step forward!"

As the Institute continues to diversify its revenue base by creating more programming, DonorPerfect, WebLink and QuickBooks have allowed Michelle to use her time more strategically, which is already ready paying big dividends for the Institute. "Instead of being a data entry clerk, I can now concentrate on real fundraising, development and revenue generation."

FOR MORE INFORMATION VISIT:

SofterWare, Inc.
www.donorperfect.com

QuickBooks
www.quickbooks.com

Our product and QuickBooks Financial Software work together to help simplify your business management. QuickBooks 2006 Financial Software helps you get more done faster, with a new Home page, simplified Customer and Vendor Centers, and sophisticated business planning tools.

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