



Getting Started with GiftWorks Pro

Getting Started

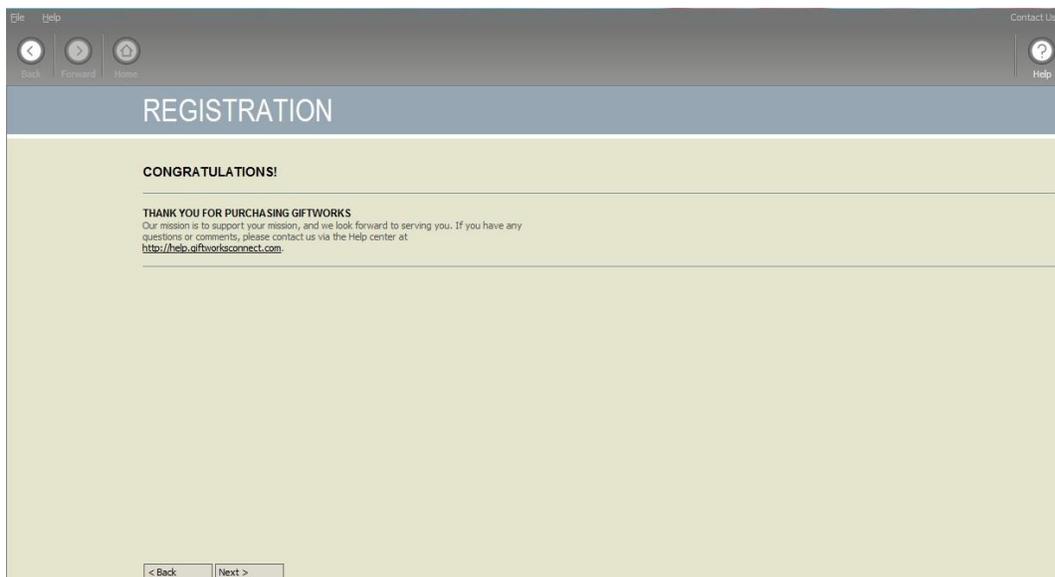
GiftWorks Pro utilizes Microsoft SQL Server technologies for its database functionality. GiftWorks Pro can be used with Microsoft SQL Server versions 2005 or greater. This includes all editions of Microsoft SQL Server **except** Microsoft SQL Azure.

Microsoft SQL Server only needs to be installed once, even if you have purchased multiple GiftWorks Pro licenses. You can install this on a dedicated server or any computer that meets the minimum system requirements for Microsoft SQL Server. For more information on Microsoft SQL Server visit the Microsoft website.

You may want to have your Computer Professional available when installing Microsoft SQL Server and when setting up GiftWorks Pro. You will need to have access to specific server information to configure GiftWorks Pro.

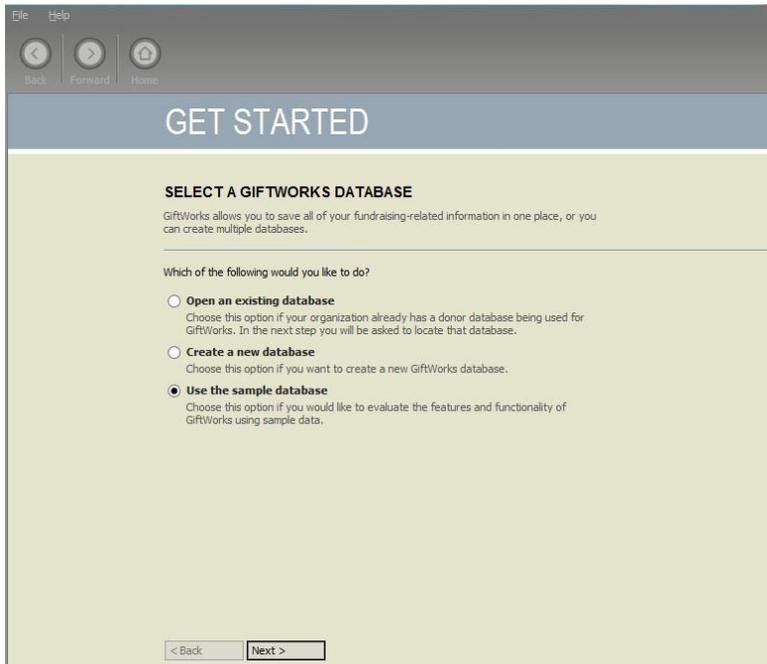
The first time you start GiftWorks, you can choose **Try GiftWorks Free** to use it as a free trial. The free trial is the GiftWorks Standard version of GiftWorks which does not use Microsoft SQL Server. If you want to use this option to try GiftWorks for 30 days, do not enter in your GiftWorks Pro software key.

The next step is to register GiftWorks. Registration is required for both trial and purchased installations. Once you complete your registration, you will be taken to the screen below.



Click Next to continue.

If you have not entered in your GiftWorks Pro software key, you will see the screen below.

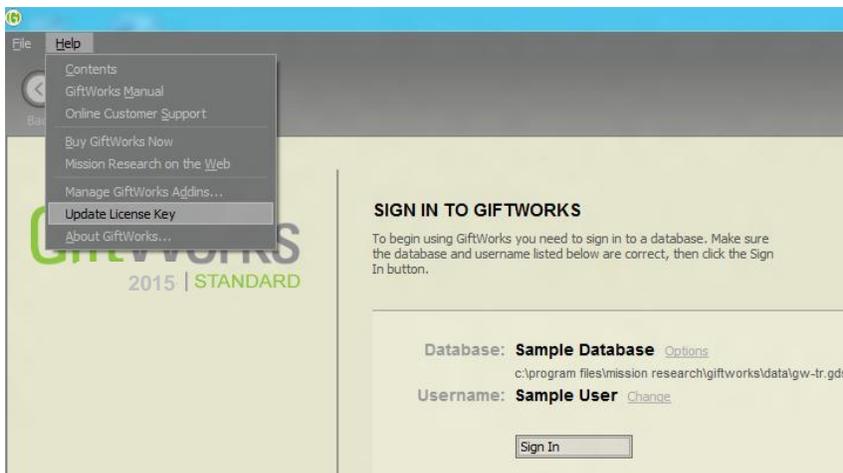


Here you can choose to use the sample database. Click Next to continue.

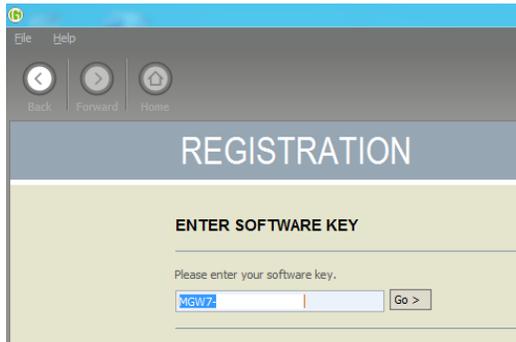
You will then be taken to the Sign In screen. You can now sign in and use the Sample Database for **GiftWorks Standard**.

If you've already purchased GiftWorks Pro, you can enter your software key when you install GiftWorks. Or, if you have chosen to use the free trial and now want to register your GiftWorks Pro key, you will need to go back to the Sign In screen.

Click on the Help option at the top left corner of GiftWorks and choose Update License Key



Here you can enter in your GiftWorks PRO software key

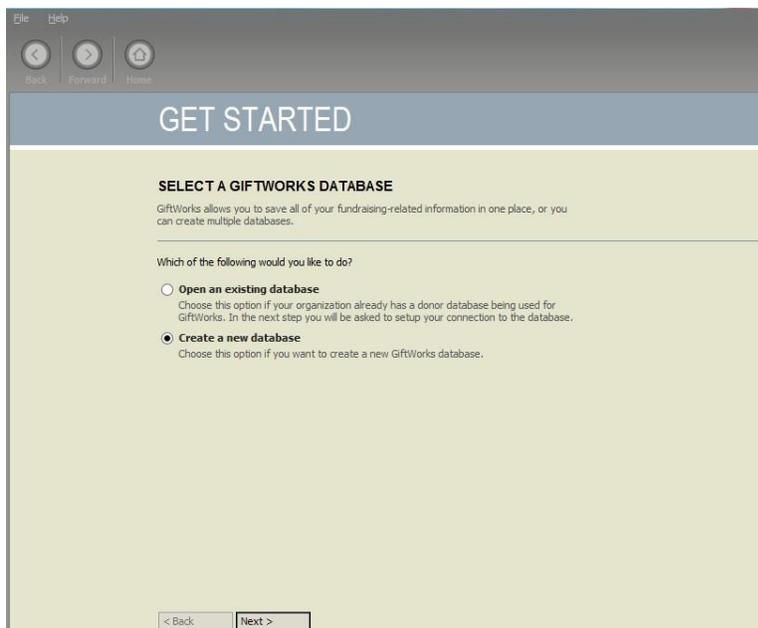


Click Go and then register your copy of GiftWorks. Click Next to continue to the Get Started screen. Here you can Open an existing database or Create a new database.

When you use GiftWorks Pro the first time, it's a good idea to create a sample database. We have provided this option, which includes donors, donations, mailings, SmartLists, tasks, and other data, so you can see how GiftWorks works and what it looks like with your real information in it.

Take a few days or even a week or two to work with the sample database, and get used to GiftWorks. Practice entering some of your own donors and donations, practice sending a mailing, running reports, creating SmartLists, and creating tasks.

Start by choosing to Create a new database.



Click Next to continue.

File Help

Back Forward Home

GET STARTED

CREATE A NEW DATABASE

Enter your name, the name or address of your Microsoft SQL Server, the desired database name, and your login information to the Microsoft SQL Server. Also indicate whether you want to load sample data into this new GiftWorks database.

Your Name

Server Name

Database Name

Login Information Username: leave blank to use a Trusted Connection
Password:

Include Sample Data info

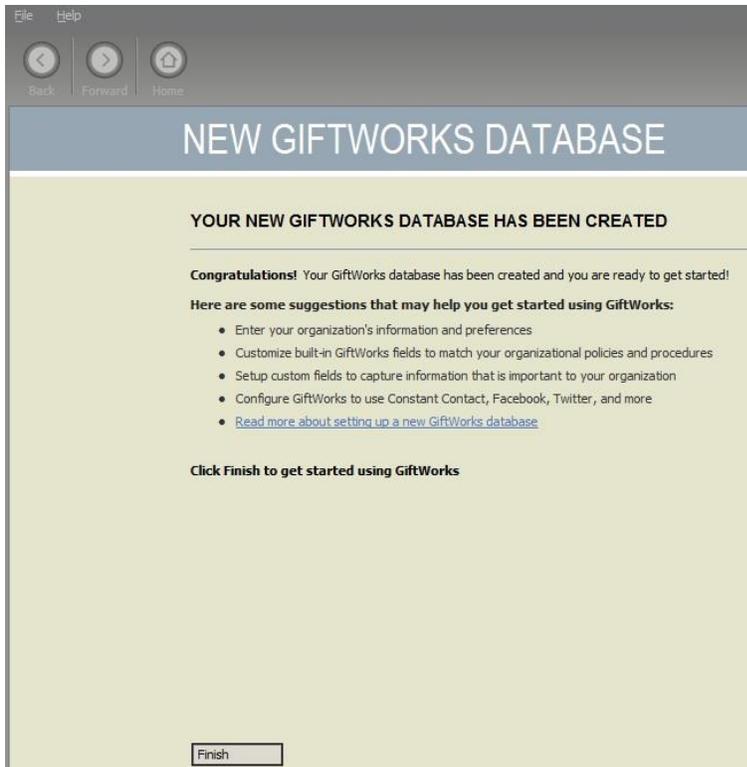
< Back Next > Cancel

Enter Your Name, Server Name, the Database Name (Ex: Sample database), Login Information (Username and password for the server) and check the box to Include Sample Data.

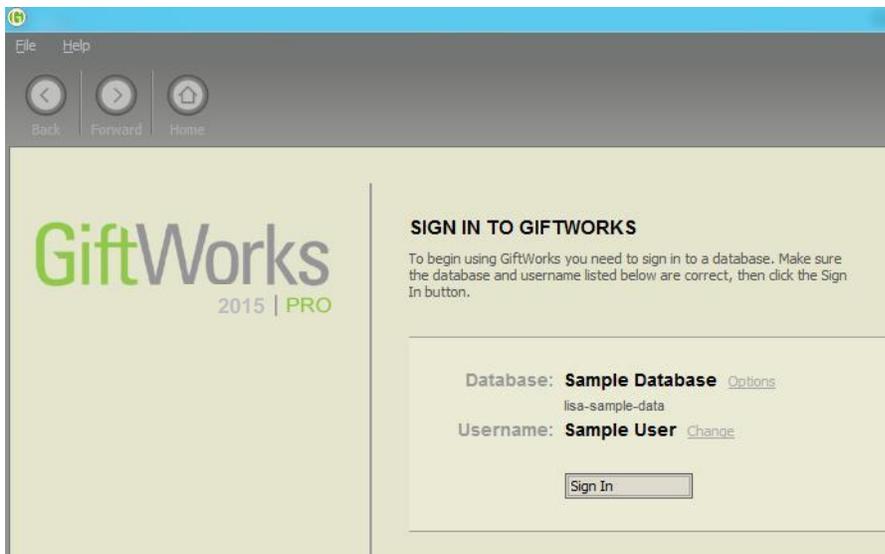
****You may need to contact your Computer Professional for the Server Name and Login information****

Click Next at the bottom of the screen.

Review the information on this screen. Click Finish to start using your Sample database.



This will take you back to the sign in screen.



Click Sign In.

Since you are signing into a database that contains sample data, you will see the following prompt. Click OK to continue.



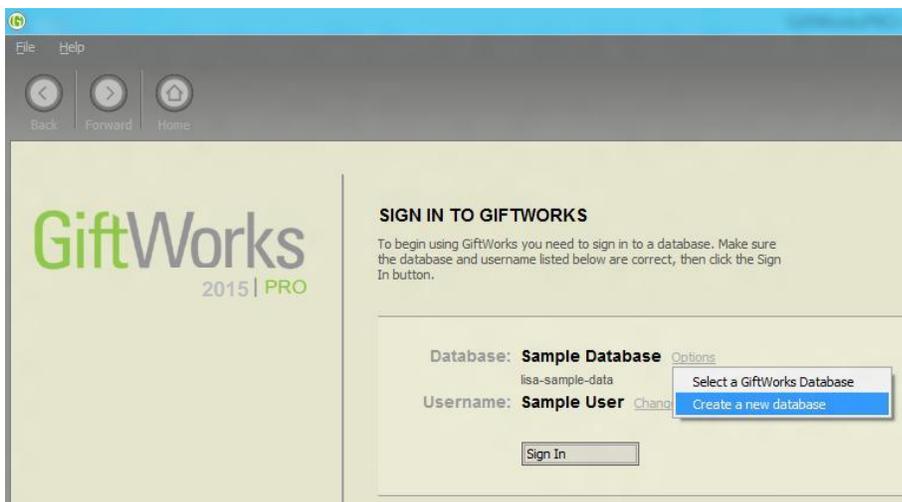
When you are done working with the sample database and are ready to import or enter your own real data, you will need to create a new database.

Creating a New Database

Once you familiarize yourself with GiftWorks by working with the sample database and are ready to get started with your own real information, you'll want to create a **new** database.

Sign out of the Sample Database.

Choose the Create a new database option from the Sign In screen.



Enter Your Name, Server Name, the Database Name (For the database name, you may just want to use your organization's name, or perhaps some other relevant and descriptive name). and Login Information (Username and password for the server). **Do not** check the box to Include Sample Data.

Click Next at the bottom of the screen.

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GET STARTED

CREATE A NEW DATABASE

Enter your name, the name or address of your Microsoft SQL Server, the desired database name, and your login information to the Microsoft SQL Server. Also indicate whether you want to load sample data into this new GiftWorks database.

Your Name

Server Name

Database Name

Login Information Username: Password: leave blank to use a Trusted Connection

Include Sample Data info

< Back Next > Cancel

Review the suggestions on this screen and also click on the link to [Read more about setting up a new GiftWorks database.](#)

GiftWorks

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NEW GIFTWORKS DATABASE

YOUR NEW GIFTWORKS DATABASE HAS BEEN CREATED

Congratulations! Your GiftWorks database has been created and you are ready to get started!

Here are some suggestions that may help you get started using GiftWorks:

- Enter your organization's information and preferences
- Customize built-in GiftWorks fields to match your organizational policies and procedures
- Setup custom fields to capture information that is important to your organization
- Configure GiftWorks to use Constant Contact, Facebook, Twitter, and more

[Read more about setting up a new GiftWorks database](#)

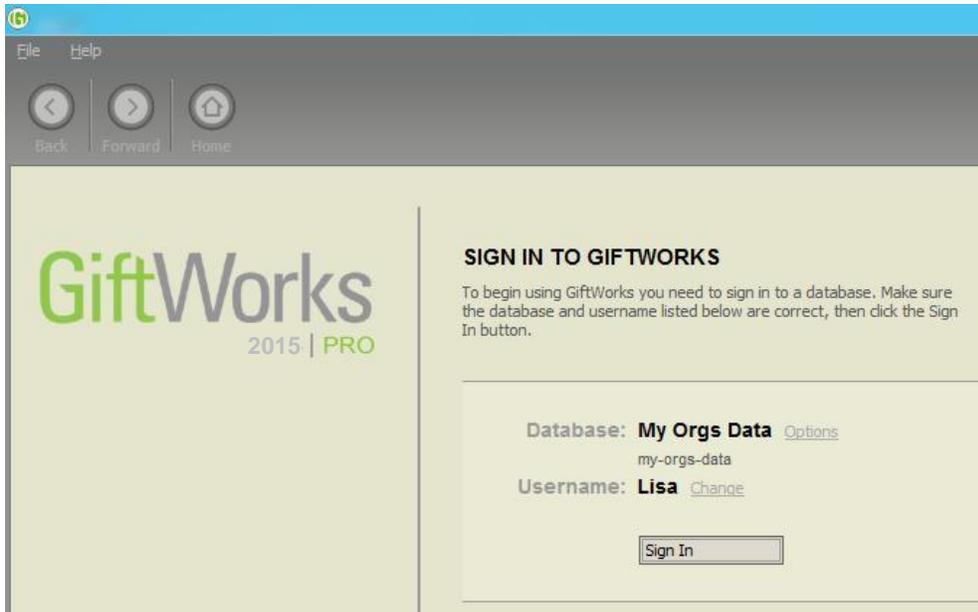
Click **Finish** to get started using GiftWorks

Finish

Online Internet Updates

Click **Finish**.

This will take you back to the sign in screen.



Click Sign In to get started with GiftWorks Pro.

Entering Your Organization Information

Click on the Settings icon at the top of GiftWorks, then click **Change your organization information** under the **Organization Options and Setup** heading.

The information you enter for your organization here can be used in letters, receipts, labels, and other places in GiftWorks. Entering the information here and inserting it into your letters ensures that it is consistently presented in your communications with donors. None of the fields is required.

SETTINGS

CHANGE YOUR ORGANIZATION INFORMATION

Enter information about your organization in each of the fields below. You can use these values in letter templates and in other areas of GiftWorks.

GENERAL DETAILS

Organization Name:	<input type="text" value="Small Dog Rescue"/>
Acronym:	<input type="text" value="SDR"/>
Federal EIN:	<input type="text" value="1197889"/>
Website:	<input type="text" value="www.rescuemalldogs.org"/>
Mission Statement:	<input type="text" value="save small dogs - because everyone deserves love."/>

CONTACT INFORMATION

Address:	<input type="text" value="355 E. Liberty Street"/>
City:	<input type="text" value="Lancaster"/>
State/Province:	<input type="text" value="PA"/>
ZIP/Postal Code:	<input type="text" value="17603"/>
Country:	<input type="text" value="United States"/>
Phone Number:	<input type="text" value="(717) 555-1212"/>
Email Address:	<input type="text" value="rescues@rescuemalldogs.org"/>

General Details:

- Organization Name—The name of your organization.
- Acronym—The abbreviation for your organization, if any.
- Federal EIN—Your employer identification number, or other official identifier for your organization.
- Website—The URL (web address) of your organization’s website.
- Mission Statement: The mission statement for your organization.

Contact Information:

- Enter in the Address, phone and email information for your Organization.

When you have finished entering your organization’s information, click **Save**.

Entering Your Organization Preferences

Click on the Settings icon at the top of GiftWorks, then click **Change your organization preferences** under the **Organization Options and Setup** heading.

SETTINGS

CHANGE YOUR ORGANIZATION PREFERENCES

Specify the preferences for your organization below. These choices control GiftWorks for all users in your organization.

FINANCIAL DETAILS

Fiscal Year Starting Month/Day: /

Allow Zero-Dollar Donations:

DISPLAY INFORMATION

Default Rows Per Page:

Maximum Rows Per Page:

FUNCTIONAL LIMITS [Reset Limits To Defaults](#)

Mailing Recipients:	<input type="text" value="10000"/>	View and Manage Task Results:	<input type="text" value="200"/>
Find Donor Results:	<input type="text" value="1000"/>	Transactions To Post:	<input type="text" value="1000"/>
Find Duplicate Donor Results:	<input type="text" value="1000"/>	Quick Import Rows:	<input type="text" value="1000"/>
Manage Deleted Donor Results:	<input type="text" value="1000"/>	Import Rows:	<input type="text" value="25000"/>
Manage Deleted Donation Results:	<input type="text" value="1000"/>	SmartUpdate Items (warning):	<input type="text" value="10000"/>

Reports

Chart/Graph Items:	<input type="text" value="25"/>
List Columns:	<input type="text" value="20"/>
Summary Report Items:	<input type="text" value="20000"/>

SMARTLIST DEFAULT TEMPLATES

Donors SmartList Template:

Donations SmartList Template:

Pledges SmartList Template:

Financial Details:

- Fiscal Year—The starting month and day of your organization’s fiscal year, if different than the calendar year. This setting gives you the ability to create SmartLists and reports based on your fiscal year in addition to the calendar year.
- Allow zero-dollar donations: This option controls whether a donation of zero dollars will be able to be entered into GiftWorks.

Display Information: This information is used for ‘paging’ when viewing certain areas of GiftWorks like SmartLists, Address Validation, Transaction Register and Mailing Lists.

- Default Rows Per Page – This controls the default number of rows that show per page. Each user can change this option as needed when customizing the area they are in.
- Maximum Rows Per Page - This controls the maximum number of rows that show per page. This can only be changed by a user that has access to the Settings area.

Functional Limits and SmartList Default Templates can be updated later as needed.

Mailer Information:

- Enter in the Mailer information if you will be sending out bulk mailings.

When you have finished entering your organization’s preferences, click **Save**.

Entering Default Values for New Donors

Click on the Settings icon at the top of GiftWorks, then click on **Organization Options and Setup**. Click on **Change Default Values For Donors**.

This screen is where you will enter default values or settings for new donors entered into GiftWorks. The settings you enter here will be applied to each donor added to GiftWorks. Note that unless otherwise noted the settings will not be applied to imported donors.

SETTINGS

CHANGE DEFAULT VALUES FOR DONORS

You can set default values for a variety of Donor fields. These default values will be used when when a new donor is added to GiftWorks.

DONOR FIELDS

Phone Settings:	US-formatted phone number change
Address Name:	<input type="text" value="Home Address"/>
City:	<input type="text" value="Lancaster"/>
State/Province:	<input type="text" value="PA"/>
ZIP/Postal Code:	<input type="text"/>
Country:	<input type="text"/>
Phone Name:	<input type="text" value="Home Phone"/>
Email Name:	<input type="text" value="Personal Email"/>
Status:	<input type="text"/>
Assigned To:	<input type="text"/>
Display Name Format:	<input type="text" value="Last, First"/>
Proper Case Names:	<input checked="" type="checkbox"/>
Guess Gender:	<input checked="" type="checkbox"/>
Guess Prefix:	<input checked="" type="checkbox"/>
Individual Female Prefix:	<input type="text"/>
Household Female Prefix:	<input type="text"/>
Organization Addressee:	<input type="text" value="Include contact after organization name with attention (i.e. ATTN)"/>
Organization Attention:	<input type="text"/>
Issue Receipts:	<input checked="" type="checkbox"/>
Receipt Group:	<input type="text" value="Receipts"/>

Donor Groups	
Group Name	Description
<input type="checkbox"/> Adopted R...	Our adopted rescued small dogs
<input type="checkbox"/> Board Mem...	A donor who is a member of our board of directors
<input type="checkbox"/> Dog Days F...	Past Fun Run participants
<input type="checkbox"/> Forever Fa...	Families that have adopted rescues from us
<input type="checkbox"/> Foster Home	Provides a foster home
<input type="checkbox"/> Member	A donor who has a yearly membership with us

Mailing Lists	
List Name	Description
<input checked="" type="checkbox"/> Welcome Letters	Letters to be sent to new donors
<input type="checkbox"/> Newsletter	Our organization's newsletter
<input checked="" type="checkbox"/> Information Mailer	Quarterly Update

Default Values and Settings for Donor Fields

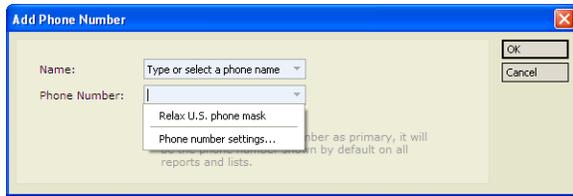
Phone settings

You can have GiftWorks automatically format phone numbers as U.S. numbers with a style of (717) 555-1212) as you enter them. Or you can have GiftWorks allow any format. If you will be entering primarily international phone numbers, you should choose **Allow phone numbers in any format**.

Choosing **Allow phone numbers in any format** also lets you choose a default country code.

At the bottom of the window, you can choose a default area code. For U.S.-formatted phone numbers, this will be entered as the area code. For any-format numbers, it will be appended after the country code (if any).

If you restrict phone numbers to U.S. format, you can still override (also known as “relax”) the restriction per phone number when you enter or edit donor contact information. To do so, click the gray down arrow on the right side of the **Phone Number** box when adding or editing a phone number. Then click **Relax U.S. phone mask** (shown below). Then enter the current phone number in any format without changing the overall phone format setting. You can also access the overall settings from the same location.



ADDRESS NAME

If most of your donor's provide you with a Home address, you can set that as the default Address Name.

City, State/Province, ZIP/Postal Code, Country

If your donors have predominantly the same information for any of these fields, you can enter a default value. These values will be applied to any addresses entered into GiftWorks (except those imported using the import process).

Phone name

If most of your donor's provide you with a Home phone number, you can set that as the default Phone Name.

Email name

If most of your donor's provide you with a Home email address, you can set that as the default Email Name.

Status

If most of your donors will have the same status, you can set that default value.

Assigned to

If most of your donors will be assigned to the same person, you can set that default value.

Display Name Format

The options are **Last, First** and **First Last**. For donors whose names GiftWorks can split into first and last names, GiftWorks will default the display name to the format you choose here. You can type over the default value, or choose a different option from the list while entering the donor's information. The display name format will be applied to all donors you add to GiftWorks (including those that are imported).

The display name is used throughout GiftWorks to identify donors, including in SmartLists and reports. To make sorting work the way you want, you should decide on a default format for display names and stick with it.

IMPORTANT NOTE

Typically, you'll get the best sorting results if you use **Last, First** as your default format.

Proper case names

Check this option if you want GiftWorks to proper case the name and address information when adding a donor. For example, john doe will be changed to John Doe.

Guess gender

Check this option if you want GiftWorks to guess the Gender when adding a donor. This is based on the prefix provided.

Guess prefix

Check this option if you want GiftWorks to guess the Prefix when adding a donor. This is based on the name provided.

Individual female prefix

Use this option to choose the prefix you would like GiftWorks to assign when guessing at the prefix for an individual female donor.

Household female prefix

Use this option to choose the prefix you would like GiftWorks to assign when guessing at the prefix for female donor that is part of a household.

Organization addressee

Use this option to choose the format to use for your organizational formal and informal addressees.

Organization attention

Use this option to choose the value you would like to use for your organizational addressee attention line.

Issue receipts

Check this option if the majority of your donors would like to receive receipts for their donations.

Receipt group

Choose the default value for the receipt group to place the donations into if you have checked the Issue Receipts option above.

Donor groups

If most of your donors will be added to the same Donor Group(s) you can set those default values.

Mailing lists

If most of your donors will be added to the same Mailing List(s) you can set those default values.

When you have finished setting default values, click **Save**.

Entering Default Values for New Donations

Click on the Settings icon at the top of GiftWorks, then click on **Organization Options and Setup**. Click on **Change Default Values For Donations**.

This screen is where you will enter default values or settings for new donations entered into GiftWorks. The settings you enter here will be applied to each donation added to GiftWorks. Note that unless otherwise noted the settings will not be applied to imported donations.

The screenshot shows a web interface for setting default values for donations. At the top, there is a blue header with the word 'SETTINGS' in white. Below it is a light blue bar with the text 'CHANGE DEFAULT VALUES FOR DONATIONS'. A paragraph of text explains that these default values will be used for new donations. Below this is a section titled 'DONATION FIELDS' with a horizontal line underneath. The fields are: 'Payment Type' with a dropdown menu set to 'Check'; 'Campaign' with a dropdown menu set to '2011 Annual Campaign'; 'Appeal' with a dropdown menu set to '2011 Information Mailer'; 'Fund' with a dropdown menu set to 'Operating Fund'; 'Number of Pledge Payments' with a text input field containing the number '4'; 'Payment Frequency' with a dropdown menu set to 'Four times per year (quarterly)'; and 'Acknowledgment' with a dropdown menu set to 'Add to 'Thank You Letters' mailing list'.

Default Values and Settings for Donation Fields

Payment Type

If most of your donations come in as a certain payment type (for example, checks), you can choose that type as the default for new donations. This will be applied to all gifts and pledge payments typed into GiftWorks (but not those imported using the import process).

Campaign/Appeal/Fund

If your donations are primarily applied to a certain campaign, appeal, and/or fund, you can choose a default value here. These values will be applied to any donations typed into GiftWorks (but not those imported). You can change this setting periodically to reflect your current campaign and appeal. For example, when you move from your 2012 Annual Campaign to your 2012 End-of-Year Campaign, you can change the default setting to expedite data entry.

Number of Pledge Payments/Payment Frequency

If your pledges are typically annual pledges paid monthly (to use just one example), you can enter 12 as the number of payments and once per month as the payment frequency. GiftWorks will use these values when calculating the default payment schedule for new pledges.

Acknowledgement

If you use the same Acknowledgement method for most or all of your donations, you can set that default value here.

When you have finished setting default values, click **Save**.

Creating an Administrative Password

If desired, you can create a password that is required to access to the Settings section of GiftWorks. This prevents unauthorized access to administrative functions and settings (like database maintenance, customizations, and accounting settings).

Click on the Settings icon at the top of GiftWorks, then click on **Security and Auditing**.
Click on **Set or Change Administrative Password**.

The screenshot shows a web interface for setting an administrative password. At the top, there is a blue header with the word 'SETTINGS' in white. Below it is a light blue bar with the text 'SET ADMINISTRATIVE PASSWORD'. The main content area is white and contains the following text and form elements:

- A note: "This password is case sensitive, so be sure to type it exactly the same way every time."
- A label: "Type your new password:" followed by a text input field.
- A label: "Type the new password again to confirm:" followed by a text input field.
- A note: "If your password contains capital letters, be sure to type them the same way every time you enter it."
- A label: "Type a word or phrase to use as a password hint:" followed by a text input field.
- A note: "PLEASE NOTE: Your password hint will be visible to everyone who uses GiftWorks."
- At the bottom, there is a light yellow bar containing two buttons: "Save" and "Cancel".

When you have finished setting the administrative password, click **Save**.

Manage Fields For Adding New Donors

You can choose additional fields to make available when adding a new donor.

Click on the Settings icon at the top of GiftWorks, then click on **Organization Options and Setup**.

Click on **Manage Fields for Adding New Donors**.

The screenshot shows a web interface for managing fields for adding new donors. At the top, there is a blue header with the word 'SETTINGS' in white. Below it is a light blue bar with the text 'MANAGE FIELDS FOR NEW DONOR'. The main content area is white and contains the following text and form elements:

- A note: "You can choose additional fields to make available when adding a new donor. These fields can be ordered and will be displayed on a separate dialog page."
- A note: "Click on a field from the Available Fields list and use the Add button to move the field into the Included Fields list on the right. Select an item in the Included Fields list and use the Move Up and Move Down buttons to change the order of the fields."
- Two columns of fields: "Available Fields" and "Included Fields".
- Buttons between the columns: "Add >", "< Remove", "Move Up", and "Move Down".
- At the bottom, there is a light yellow bar containing two buttons: "Save" and "Cancel".

You can choose to include any of the fields listed here.
When you have finished choosing the fields, click **Save**.

CHANGE RECEIPT OPTIONS

Set up your starting receipt number, default letter and more from this area.
Click on the Settings icon at the top of GiftWorks, then click on **Financial and Accounting**.
Click on **Change Receipt Options**.

SETTINGS

CHANGE RECEIPT OPTIONS

Enter the following receipt information. This information will be used to control donation receiving.

RECEIPT NUMBER

You may need to change the starting receipt number to match your current receipt numbers or to match pre-printed receipts.

Note: Setting the number to a value lower than the current Starting Receipt Number may create duplicate receipt numbers in this database.

Current Starting Receipt Number: 1

New Starting Receipt Number:

RECEIPT LETTER

Select the default letter to be used for receipt mailings.

Default Receipt Letter Template:

RECEIPT STATUS

Specify the receipt status descriptions for original receipts, reprinted receipts and replacement receipts.

Note: The previous receipt numbers will be printed for replacement receipts.

Original Receipt Description:

Reprinted Receipt Description:

Replacement Receipt Description:

REISSUE RECEIPT PROMPT

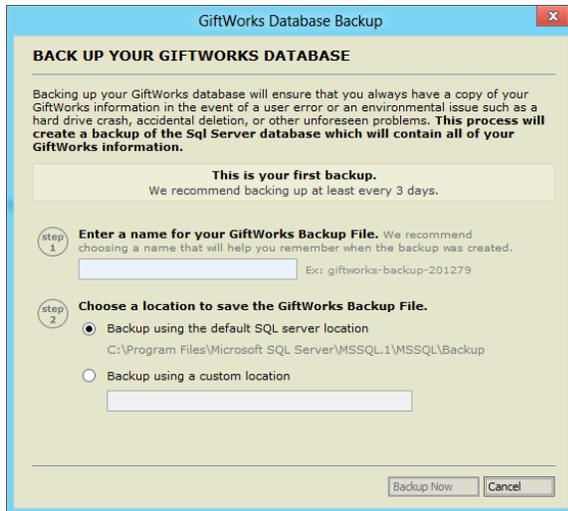
Indicate whether users should be prompted to reissue receipts when changing donations or received pledge payments that have already been received.

When you have finished setting up your receipt options, click **Save**.

BACK UP YOUR DATABASE

Backing up your GiftWorks database will ensure that you always have a copy of your GiftWorks information in the event of a user error, environmental issue such as a hard drive crash or other unforeseen problems.

Click on the Settings icon at the top of GiftWorks, then click on the **Backup your database** link under the **Importing, Exporting, and Data Management** area.



Follow the steps above and click on Backup Now to complete the backup process.

Creating GiftWorks Standards for Your Organization

Consistent data entry is extremely important for ensuring that you have accurate, uniform, easily accessible and reliable information in GiftWorks.

GiftWorks provides tools to limit the entry of duplicates, to create default values and default formats for many fields, and other features to help with consistency. It is still important, however, that you make smart decisions about how some information will be entered, and that those decisions are written down and shared with everyone who will be entering information into GiftWorks. Doing so up front can save you a lot of time cleaning up differently entered data on the eve of a big mailing.

Donor Profiles and Affiliate Donors

When adding a donor to GiftWorks, you have several choices to make that will affect how that donor appears in GiftWorks, and how you can work with that donor for things like mailings and SmartLists.

The primary distinction between donors is the profile that is selected. The three options are donor with no profile (referred to, simply, as donor), donor with household profile, and donor with organization profile. Any type of donor (individual, couple, organization, or household) can be entered with any profile. But using profiles consistently can make it easier to locate all of your households or organizations.

Each donor, regardless of profile, has the same fields for storing information. Choosing a profile changes how the donor appears on the screen, and gives you some different profile-specific options (like **Add a household member** for a donor with a household profile). You can also use the profile type as a criteria when creating SmartLists, meaning you can also send mailings or create reports based on profile type.

Donors of any profile type can also be designated as “affiliate donors.” The affiliate designation simply means that these donors will not show up in donor counts or in SmartLists, unless you explicitly include them (using the Development Info/Donors/Affiliate Donors criteria).

The other difference is that affiliate donors cannot have donations added to their records. To add a donation, you need to remove the affiliate designation. Typically, the affiliate designation is used for

donors whose information you want to track, but from whom you either do not expect to receive donations directly attributable to them (as opposed to their household or organization), or you don't expect to include them in your lists, donor counts, or communications. You can always choose to include affiliates in such items, but by default they will not be included.

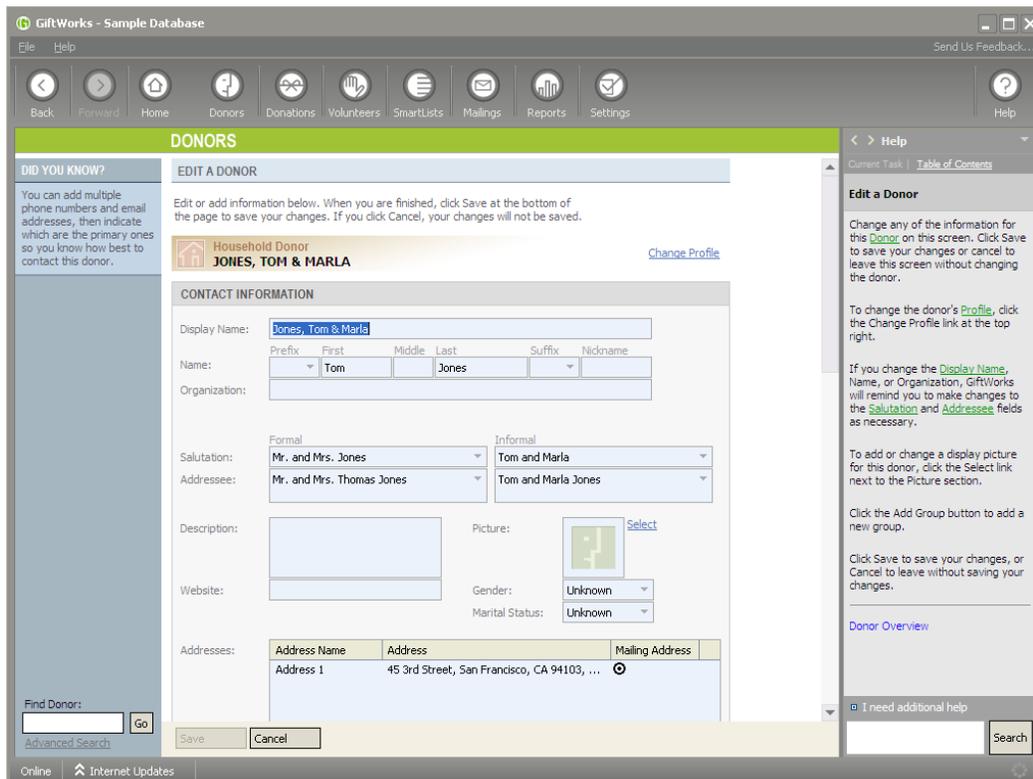
In general, the recommended (and intended) way to enter donors is as follows:

- **Individuals**—Most individual donors will be entered as donors with no profile. If the individual is someone you do not expect to receive donations from, or someone you want to contact only for specific purposes (for example, a member of the press), you can designate them as an affiliate.
- **Couples or Households**—Most couples or households are donors who are really just a single unit as far as your organization is concerned. You will solicit, receive donations from, and acknowledge them as, for example, “John and Mary Smith.” Such donors should be entered as donors with household profiles. If you want to track specific information about one or more household members, you can use the **Add Household Members** link on the **Relationships** tab when viewing the household donor. This lets you add household members as affiliate donors with family relationships to the household.
- **Organizations/Companies/Foundations**—Most organizations or companies that you enter will be entered as donors with organization profiles. If there is a person who is just your contact for that organization, but with whom you don't need to communicate in any other capacity, you can enter their contact information right in the name fields in the organization record. If you have multiple contacts for the organization from which you don't anticipate receiving donations, you can enter them as affiliate donors with work relationships to the organization donor. If you have employees of the organization in GiftWorks as donors, you can add work relationships between those donors and the organization.

Using the combination of profiles, affiliates, and relationships, you can enter donors in a variety of ways. Making decisions up front about how you want to use these options, and then applying those rules consistently when entering new donors, will give you the most consistent experience when searching for donors, creating SmartLists or reports, and communicating with your donors.

Donor Name Information

GiftWorks has a number of name fields for each donor, including first name, middle name, last name, display name, organization name, salutation, and addressee fields. Entering information consistently into these fields ensures that you can find donors easily when searching or scanning a sorted list, and that you can produce mailings with uniform results.



Display Name

The **Display Name** field is what GiftWorks uses as the primary name to display for each donor throughout GiftWorks. Display name is the only name field required for all donors. For organizations (including companies, foundations, and agencies), you will typically use the organization name as the display name.

For individuals, couples, families, and households, it likely makes the most sense to use the last name first so you can easily find a donor when scanning a list sorted by display name (which is something you'll do frequently when using GiftWorks). Below are some examples of donor names and the corresponding display name options:

Donor Name	Display Name (for optimal sorting)	Alternate Display Name
John Smith	Smith, John	John Smith
John and Mary Smith	Smith, John and Mary	John and Mary Smith
The Smith Family	Smith Family, The	The Smith Family
The ACME Corporation	ACME Corporation, The	The ACME Corporation

Default Display Name

In the Settings section of GiftWorks, there is an option to set a default format for the display name. The options for this setting are **Last, First** and **First Last**. As you enter donors, GiftWorks uses this setting to determine the display name. You can always change the display name if the default appears incorrectly, or if you want to enter another value for some reason.

To modify the default display name format:

1. Click the **Settings** button at the top of GiftWorks.
2. Click the **Organization Options and Setup** heading.
3. Click on **Change Default Values For Donors**.
4. One of the items is **Display Name Format**.
5. Choose the option you want to use. We recommend **Last, First** to optimize sorting.

The value you enter here will affect only donors entered or imported **after** you change the setting, and will not change any donors already entered into GiftWorks.

Name Fields

Each donor, regardless of profile, includes all name fields, including prefix, first, middle, last, suffix, nickname, and organization). For an individual donor, you will typically use display name, first and last, and possibly the other fields besides organization.

For a couple, household or family, you will typically only use the display name and not any of the other name fields.

For an organization or company, you will typically use display name and organization. If you have a contact name for the organization that you don't use for any other purpose (for example, someone you don't anticipate receiving donations from and with whom you don't need to communicate except in their capacity as the organizational contact), you might enter their name information in the **Name** fields.

Salutation and Addressee Fields

GiftWorks includes these four fields for communicating with your donors. Generally, the salutation fields appear after "Dear" at the beginning of a letter. The addressee fields are used for the first lines of addresses on envelopes or labels. There are formal and informal options for each.

Using consistent rules for creating your entries for these fields is very important for ensuring consistent results when creating mailings. As you enter donors, GiftWorks makes a best guess for the value of each of these fields. You can click the gray down arrow at the right side of each field to choose from the available options, or you can type your own value for each.

If you edit any of the other name fields, GiftWorks will put a reminder on the screen to check if the **Salutation** and **Addressee** fields need to be updated as well. To keep your data in sync, make sure that you update them as necessary.

Recommended entries for each is as follows:

Formal Salutation

- **Individual donor**—Mr. Smith
- **Couple**—Mr. and Mrs. Smith, or Mr. Smith and Ms. Johnson
- **Family/Household**—Smiths, or Smith Family
- **Organization**—Friends, or ACME Corporation, or Mr. Smith (if you have a contact name)

Informal Salutation

- **Individual donor**—John, or Squiggy (if you are very close to the donor and are comfortable with your organization addressing him that way)

- **Couple**—John and Mary, or Mr. and Mrs. Smith (if you are not familiar enough with the donors to use first names)
- **Family/Household**—John, Mary, and Joe, or Smiths, or Smith Family
- **Organization**—Friends, or ACME Corporation, or Mr. Smith, or John (if you have a contact name)

Formal Addressee

- **Individual donor**—Mr. John Smith
- **Couple**—Mr. and Mrs. Smith, or Mr. Smith and Ms. Johnson
- **Family/Household**—The Smith Family, or The Smiths
- **Organization**—ACME Corporation, or Mr. John Smith, or ACME Corporation (if you have a contact name)

Informal Addressee

- **Individual donor**—John Smith
- **Couple**—John and Mary Smith, or John Smith and Sue Johnson
- **Family/Household**—The Smiths, or John, Mary and Joe Smith
- **Organization**—ACME Corporation, or John Smith, or ACME Corporation (if you have a contact name)

Donor Contact Information

Addresses

It's best to decide up front what standards you will follow for entering addresses into GiftWorks, including whether and how to abbreviate street names, how to enter apartment, suite, or floor information, and whether to use ZIP+4 information where available. See the United States Postal Service's Mailing and Shipping Guidelines at <http://pe.usps.com/text/dmm100/intro.htm> to ensure that your letters are properly addressed and will get where you want them to go.

Address Name and Mailing Address

Each address you enter into GiftWorks has an address name associated with it (for example, Home Address or Work Address). Set guidelines for how you want to use this field so you have consistently named addresses. One of the donor's addresses must be marked as the mailing address. Be sure this is consistently applied and is modified if a donor gives you a new or alternate address.

Primary Phone or Email Address

Each phone number or email address that you enter into GiftWorks has a phone or email name associated with it (for example, Home Phone or Work Email). Set guidelines for how you want to use these fields so you have consistency. One of the phone numbers and one of the email addresses must be marked as primary. Be sure this is consistently applied and is modified if the donor gives you a new or alternate number or email.

Contact Preferences

For donors, you can choose preferences for how they would (or would not) like to be contacted. If you consistently apply these values and keep them up to date with the donors' preferences, it will allow you to avoid contacting donors in ways they have asked you not to.

Additional Donor Information

Donor Category

The Category field lets you classify your donors more specifically than just by profile type or whether they are an affiliate. You can use Category to separate different kinds of organizations. That way, if you want to send a mailing to all of the foundations in GiftWorks, you can easily do so. Be sure this field is consistently applied. Customize the list of categories with your initial values in the Settings area, and be sure to keep the list updated as you diversify your donor base.

Donor Source

The Source field should be used to track how donors came to know about your organization. Examples include a community festival, a list swap with another organization, and mailing to purchased list. By tracking the source of new donors, you can see what outreach or marketing campaigns are the most effective in recruiting new constituents.

Decide ahead of time what the initial values for Source are, and update them in the Settings area. Then be sure you keep the list of sources up to date as you have new outreach or recruitment campaigns.

Donor Status

Consistently using the Status field to track donors as their relationship to your organization changes over time lets you easily target communications to them. It also let you or report on donors based on where they are in their affiliation with your organization. Customize the list of statuses with your initial values in the Settings area, then be sure to keep the list up to date if you have new values to track.

It is important to consistently mark donors who pass away as deceased so that you can keep their giving history but avoid sending them future communications.

Member Since/Renewal Date

These membership-related fields let you track how long a donor has been a member of your organization and when they most recently renewed (or, optionally, when they are due to renew again).

If it is important to your organization to report on or recognize members based on years of membership, or to send membership renewal reminders, then it is important to keep these fields updated. You can then use them to create SmartLists, mailings, and reports.

Assigned To

The Assigned To field lets you track the person in your organization primarily responsible for contacting, soliciting, or maintaining the relationship with each donor. Users of GiftWorks automatically appear in the Assigned To list, and others (for example, Board members) can be added as necessary. If you consistently apply this field, it is easy to view, track, and provide a list of the donors assigned to each assignee.

ISSUE RECEIPTS and receipt group

These fields let you track whether or not the donor would like to receive receipts for their donations as well as let you choose which receipt group their donations will be added into.

Donor Groups

Groups are one of the most powerful features of GiftWorks. Each donor can be in multiple groups, so you can use groups for a variety of purposes, and can easily use the group information as the basis for SmartLists, mailings, and reports.

Be sure you enter all of the groups you need in the Settings area, and keep the list updated as needed. Also, ensure that groups are consistently applied to new or modified donors. You should also use consistent naming conventions, such as Golf Outing Sponsor 2011 and Golf Outing Sponsor 2012 so that it is easy to sort, locate, and compare groups.

Donor Custom Fields

GiftWorks lets you create up to 28 custom fields for donor records (or 75 if you are have GiftWorks Premium). Before you start using GiftWorks, look at all of the fields available for donors, and decide if there is additional information that you need to track. Create custom fields accordingly, and be sure that you consistently add information to those fields as you add new donors.

Donation Information

In addition to having standards for entering and tracking donor information, you should set standards for entering and tracking donation information. By recording consistent data for all donations, you will optimize your ability to target your fundraising efforts and maximize your returns.

Campaigns, Funds, and Appeals

You should always, at a minimum, be sure to record campaigns, funds, and appeals for each donation. See the GiftWorks Campaign Management Guide for specific information on using campaigns, funds, and appeals when recording your donations.

Solicitor

For each donation that is the result of solicitation efforts by a specific person, make sure you record their name as the solicitor. This allows you to track the effectiveness of various people in bringing in donations to your organization. You can also use this information when deciding who should work with a donor that has the potential to give a large donation.

You can customize the list of Gift Solicitors by clicking the Settings button at the top of GiftWorks, then clicking **Change field values** under the **Change GiftWorks Built-In Fields** heading. Click **Gift Solicitors**, then click **Change Field**.

Donation Custom Fields

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Customizing GiftWorks

Many of the fields in donors and donations are customizable. You can modify or delete the values that are included with GiftWorks, and you can add your own values to make GiftWorks work the way your organization works.

To customize these fields, click the **Settings** button at the top of GiftWorks, then click the **Fields, Lists and More** header. The first option on the next screen is **Change GiftWorks Built-In Fields**. Each of the modifiable fields is listed on the next screen. It is a good idea to go through each of these fields and decide whether to keep or edit the values are included with GiftWorks, as well as to add any new values you need.

Be sure you use values that will make sense to other people that view your reports and use GiftWorks. Annual Appeal Letter 2011 is easier to understand than ANLAPLLTR11. For items that recur, like your annual campaign, use consistent names and append the year to the name. For example, Annual Campaign 2011 and Annual Campaign 2012.

Values in many of the customizable lists can be hidden. If you hide a value, that prevents it from appearing as an option when new donors or donations are being added, but it will keep all of the historical data.

As an example, sometime in the first half of 2013 you will probably close out the Annual Campaign 2013. You don't want to delete that value from the list of campaigns, because you want to maintain all of the campaign information for the donations you received to that campaign. You will not, however, need to add any donations to that campaign in the future. By hiding the campaign name, you hide it from the list when adding new donations (letting you maintain a slimmer, more practical list). But you can still see the historical data and use it to create SmartLists, mailings, and reports.

Conclusion

GiftWorks has many features designed to make it easy for you to accurately enter and reliably track the wealth of information you already have and that you'll continue to gather over time. There are prefilled values for many of the lists throughout GiftWorks, but it's important that you consider how you will use these lists and what the values are that will provide the best categorization of information for your organization.

Spending some time up front to think about this will save you time in the long run and make for a consistent, reliable experience when searching for information and creating SmartLists, mailings, and reports. As you use GiftWorks, it will be important to periodically maintain the lists, hiding obsolete values and adding new ones. GiftWorks will grow and change with your organization, and can help you optimize your fundraising efforts.