

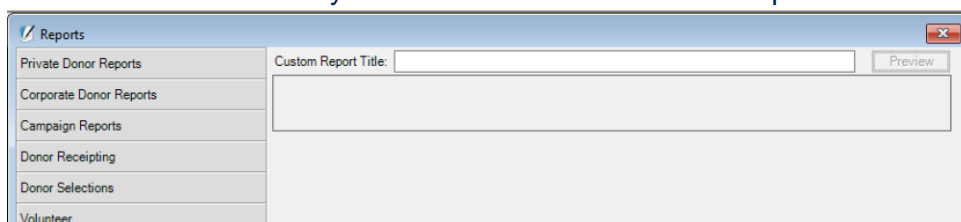


@EASE Window Features

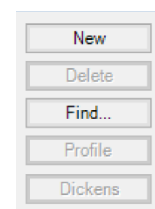
We have added a few new features to make things quicker for our clients.

Version 2019.11.20

1. Find for Private Donors defaults to Last Name in the Find field.
2. Find for Corporate Donors defaults to the Company Name field.
3. We have added Create and Preview button for Q-Xpress and Reports, respectively that are now found in the original position, but also at the top part of these windows.
4. We have added the ability to include a custom title on all reports.



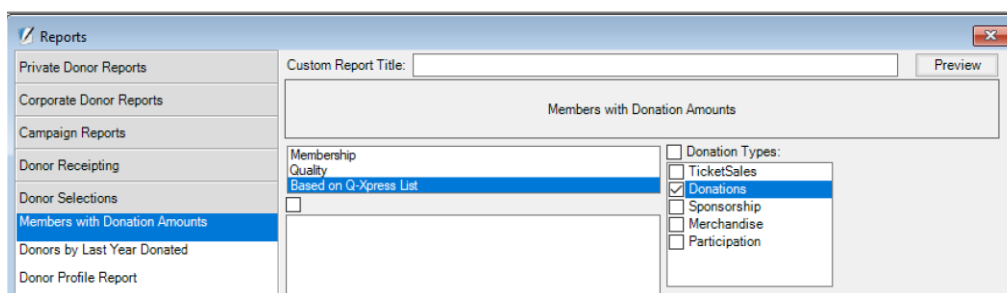
5. We added a Dickens link to the main buttons for Private and Corporate Donors.



Version 2020.05.13

NEW Report Features

1. We have added a RFM Report ... Recency, Frequency, Monetary
You can select groups of donors and run a report that will identify these features.
The report shows the last 12 months for a group of donors or by quarter over the last three years from whichever year is selected.
2. We have added the ability to run any report which currently uses either a Quality or Membership value to use with the records selected in Q-Xpress View. This eliminates having to assign a quality or membership value. If you have a group of records which you wish to retain, a quality or membership value is still required.



This offers our clients the opportunity to have more fun with their data!



New Features on Existing Reports

The screenshot shows the 'Reports' window with the 'Donor Profile Report' selected in the left-hand menu. The main area displays the configuration for this report. At the top, there is a 'Custom Report Title' field and a 'Preview' button. Below this, the 'Donor Profile Report' title is centered. The configuration is divided into several sections:

- Donor Profile:** Includes checkboxes for 'Donor Profile', 'Family', 'Other', 'Notes', 'Relationships', 'Address', 'Donations by Year', 'Achievement', 'Phone/Email', 'Volunteer History', 'Volunteer Profile', 'Commitment', 'Volunteer History', 'Pledge Info', and 'Linked Contacts'.
- Donor History:** Includes a checkbox for 'Donor History' and a date range selector 'From: Jan 01, 2020 To: May 26, 2020'. There is also a 'Print Top: 1' option and a checkbox for 'Only Print Profiles which have Dollars'.
- Campaign Type:** Includes checkboxes for 'AN - Annual Major Gifts', 'BQ - Bequest', 'BR - Branch Donations', 'CN - Conference', 'CS - Christmas Family Spons', 'DM - Direct Mail', 'EA - Education Awards', 'ED - Educational Programs', 'GA - Gala', and 'GM - Gaming'.
- Campaign Code:** Includes checkboxes for 'AUC - Auction Items', 'D01 - Quarter 1', 'D02 - Quarter 2', 'D03 - Quarter 3', 'D04 - Quarter 4', 'DCL - Declined Grant Request', 'DON - Donations', 'ED1 - Introduction to Technolog', 'FML - Family Membership', and 'GIK - Gifts in Kind'.
- Membership:** Includes a checkbox for 'Membership' and a dropdown for 'Based on Q-Xpress List'. Below this is a 'Membership List' section with checkboxes for '2019 Golf Committee', '2019 Board of Directors', 'Acct Mgr: Bill White', 'Acct Mgr: Mary Jones', 'Certificate', 'Committed Donors', 'Date of Birth', and 'Elite Donors' (which is checked).
- Foundation:** Includes checkboxes for 'Foundation', 'Group: Laura Group', 'Member Since', 'Newsletter', 'Open House Guests', 'Past Board of Directors 2002', 'Past Board of Directors 2004', 'Past Board of Directors 2005', 'Past Board of Directors 2014', and 'Past Board of Directors 2015'.

At the bottom, there are date range selectors for 'Campaign Year From: To:' and 'Membership From: May 26, 2020 To: May 26, 2020'. A checkbox for 'New Page per Donor' is also present.

The Donor Profile Report has been updated with a check box to print only those donors in the selected group who have donations in the Donor History date range.