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# 1 INTRODUCTION

## 1.1 Introduction

This manual covers release number 6.06d of the **DONATION** program for Windows 8.1, Windows 10, Windows 11, or Windows Server 2008 SP2 or later. DONATION is a product of Software4Nonprofits.

To see the changes between successive versions of DONATION, see the [Revision History](#).

The program is used to track donors and donations, and issue receipts, for charitable organizations in Canada, the U.S.A., and elsewhere. This Windows version was first used by Toronto Monthly Meeting of the Religious Society of Friends (Quakers) in January, 1999 and had over 5,500 registered users as of December, 2015.

There are several versions of DONATION - the Standard, [Local Network Versions](#), and [OnDemand](#) versions.

If you also need to do more general bookkeeping, including tracking expenses and creating Income Statements, possibly with fund accounting, we encourage you to consider our companion [ACCOUNTS](#) software program. Of course, DONATION can also be used in association with other bookkeeping software, or more manual bookkeeping solutions. DONATION and ACCOUNTS (or also Intuit QuickBooks Desktop) can interact through the Bank Deposits feature in DONATION. That feature allows you to specify which donations are part of a bank deposit, then export that as a summary transaction (summarized by donation category / income account) and import it into ACCOUNTS or QuickBooks Desktop.

The following are some of the general features of all of the versions of DONATION.

### Data Entry

- It records names, addresses, phone numbers and email addresses of donors.
- It allows for the use of member or envelope numbers, if desired.
- It allows for the specification of various categories of donor and donation.
- It allows for the recording of 6 user-specifiable fields about donors, plus a comments field of virtually unlimited length.
- It allows for the specification of a list of Groups or Committees that donors can be members of, and recording which of them each donor is a member of.
- It can record a simple annual pledge amount for each donor, or switch to more complex pledging options - annual with start date and category, or multi-year with category.
- It records dates, amounts, donation categories, cheque numbers (or how the donation was paid) and optionally descriptions for individual donations.
- It is very quick and simple to use - donors can always be picked from a scrolling list, or searched for with two different Find features.
- There is a special data entry form to speed entry of weekly donations, collections or offerings for churches. See [Features for Churches](#) for details on this and several other helpful features for churches and places of worship.
- There is an optional limited-entry password for volunteers to do entry without seeing full details on donors or donation history.

- You can identify which donations are part of one [bank deposit](#), and export a transaction representing that bank deposit to Software4Nonprofits ACCOUNTS or Intuit QuickBooks Desktop.
- You can memorize [recurring donations](#) and set each one up to be automatically inserted on a weekly or monthly schedule.
- It automatically records information about all [communications](#) with your donors, including all emails sent to them (for receipts, statements or letters, or just individual or mass emails), and receipts, statements and letters printed or saved to PDF for your donors. You can also manually record communications such as phone calls and visits, with your comments.

### Reports

- It prints over 30 different reports on donors, donations, receipts, categories and fiscal year donations.
- It has two different ways to create [custom reports](#).
- It allows you to export reports to various file formats, such as Excel, tab-separated text, or CSV (comma-separated value).
- Customized reports can be [memorized](#) for later re-use.
- It has a powerful ability to create mail merge letters or receipts for one, all or some donors.

### Receipts

- It prints numbered charitable receipts in a simple standardized format, plus mailing labels for those receipts (Note: In Canada, you must have a charitable registration number to issue charitable tax receipts. While other organizations do send receipts, they cannot be used as a tax deduction, and the receipts printed by this program may not be suitable for that use.)
- It can print a receipt for just one donor, or for all donors with unreceipted donations, or for a selected subgroup of all donors with unreceipted donations.
- The receipts include a section to send with your tax form that just gives the total, an optional 2nd section with the details of each individual donation during the year, and a 3rd section with the totals by category of the donations.
- It has different receipt formats for users in the U.S.A., Canada, Quebec Australia, and other countries.
- It can optionally print bilingual (French/English) or French-only receipts, for users in Quebec, with an extra copy for the donor's provincial tax form.
- You can email receipts or statements to donors with email addresses.
- Canadian receipts properly handle what the Canada Revenue Agency (CRA) calls "split receipting" - the handling of donations where the donor receives an "advantage", using an optional Eligible Amount field.
- Canadian receipts also properly handle what the CRA calls "non-cash gifts", or gifts in kind, even ones with an appraisal.
- It can print duplicate receipts (for example if someone loses one).
- It can print corrected receipts (if something in the receipt was incorrect).
- It can print receipts in a format of your choosing instead of the built-in formats, by using the mail merge features.

### Other Features

- It has context-sensitive help and a full manual online.
- It uses a powerful open source SQL-based Firebird database, and thus the data can be accessed for other purposes (with appropriate tools).
- It can be used to store donations for multiple organizations on the same computer.
- It has simple options to backup all of your data to a local drive (preferably a USB memory key), and to restore such backups. Those backups can also optionally be followed by an encrypted backup to a secure Internet location, and those Internet backups can be restored.
- It lets you send encrypted backups to yourself or a colleague by email, and restore those backups.
- It reminds you to do backups of your database weekly, or at a frequency of your choosing.
- It can import files of donors from assorted file formats.
- It can import regular (for example monthly) donations.
- While the program is entirely in English, limited entry of accents and characters for foreign languages should be possible.
- Dates and currency are displayed in your regional format, as defined in Windows Control Panel's Regional settings.

#### Limitations / Requirements

- It can generate at most 99,999 numbered receipts per year.
- It is probably best suited to small to mid-sized organizations, because many larger organizations might want a more full-featured and customizable program.
- It is not a full-featured fundraising system, although the [Recorded Communications](#) features introduced in 5.06 will be very helpful to users who are doing fundraising. Use a larger and more expensive system if that is your requirement. This program is intended primarily for record-keeping of donors and donations, issuing receipts, reporting and mail-merge.
- It runs under all recent versions of Windows: Windows 8.1, Windows 10, Windows 11, or Windows Server 2008 SP2 or later.
- It is possible to run successfully on a [Mac](#) using the Parallels program (which allows you to install a copy of Windows and then run Windows programs on a Mac). However, we cannot support any problems that are specific to using it on a Mac.
- It requires your screen properties to be set to 800 x 600 or higher, with Normal size Fonts selected in your Display settings, or to 1024 x 768 or higher, if you are using Large size Fonts. This program will not work on a 640 x 480 display, and part of the main window will be hidden if you use 800 x 600 resolution and Large size Fonts.

## 2 LICENSE INFORMATION

### 2.1 License Information

DONATION is licensed and copyrighted software. You are free to download it and evaluate it without charge, but except for the legacy Lite version, you are required to pay for the software to continue using it after your evaluation period. Details are on the [PRICING](#) page on the program's web site.

The software license agreement is provided in the file LICENSE.htm, which is installed in the program's main directory, usually C:\Program Files\DONATION. The license can be easily viewed by using the program's **Help** ⇒ **View License Agreement** menu option.

Additional license information for components of DONATION that were not created by Software4Nonprofits:

This software contains Gemini Firebird ODBC Driver (c) 1999-2007 Aleksey Karyakin.

The Firebird database included with DONATION is subject to both [The InterBase Public License](#) (a version of the Mozilla Public License 1.1) and the [Initial Developer's Public License](#).

A copy of the novaPDF Professional PDF printer driver software, restricted for use only by DONATION, is included with DONATION. Fully licensed versions of this, which can be used with applications other than DONATION, are available from [www.novapdf.com](http://www.novapdf.com). A license for the restricted version is located in the novaPDF folder under your DONATION installation folder, in the file License.rtf.

### 2.2 Software Licensing and Evaluation

Starting with version 2.70, all versions of DONATION except for the legacy [Lite](#) version have software licensing built into them.

What this means is that when you first install DONATION, or first upgrade an earlier version to version 2.70 or later, it will start out as an Evaluation version of the program. This evaluation period will expire in 30 days (though your data will still be there!). There is a 30-day grace period in which you can continue using the program after that.

The Evaluation version always starts up on the Evaluation and Licensing window of the program. As long as your evaluation period and grace period have not yet expired, you can click the **Continue** button on that window to continue on into the program, and use all features (except for creating real receipts, as mentioned above).

The Standard version is actually free, and can be used indefinitely as an Evaluation version, if you have no more than 50 donors with donations in the current year's data. The only other limitation in that case is that you can only have one database for one organization. (See [Switching Databases](#) to understand what is otherwise possible.)

If the Evaluation and Licensing window is not coming up when you start the program, you get to it with the **Tools** ⇒ **Request or Install License Key** menu option.

[Extending your Evaluation Period](#)

The Evaluation and Licensing window that comes up when the program is an Evaluation version tells you how many days you have left in your evaluation period. If your evaluation period and grace period have 14 or fewer days left in them, and you need more time to decide on whether to purchase DONATION, you can click the **Request Key for Extension of Evaluation Period** button. That brings up an email, addressed to Software4Nonprofits.com, requesting a 30-day extension. Please fill in the reason for your request, then [send the email](#). (Note: Until you only have 14 days left, this option is not displayed.)

**Note:** The email request will **not** appear in your email program's Sent Mail folder.

You should receive an email response, generally within 2 business days, but usually much sooner. This response will explain what to do. Basically, the email contains a key, consisting of numbers and letters. In the Evaluation and Licensing window, click the **Install Key for Extension of Evaluation Period** button. That brings up the Install Evaluation Extension Key window. You will need to copy the key out of the email you received (by highlighting it with your mouse and pressing **Ctrl+C**, i.e. hold down Ctrl and press C) and paste it into the entry field in this window (by pressing **Ctrl+V**). Click the **Accept Key** button, and it should extend your evaluation period by another 30 days.

#### Obtaining a License Key for the Program

In order to have DONATION stop being an Evaluation version, you need to make an Annual Fee payment to Software4Nonprofits.com and install the License Key that that entitles you to in the Evaluation and Licensing window. After doing this, that window will no longer come up every time you start DONATION, and all of the features of DONATION will be available.

You are entitled to receive a License Key for your organization if you paid for DONATION within the last 12 months prior to your request for the Key.

For links to make a payment by credit card, or from your bank accounts, please [contact us](#).

Assuming that you are entitled to a license key (and a payment has already been received and acknowledged by Software4Nonprofits), if you have at least version 4.04 of DONATION and an active Internet connection, normally when you start the program it will detect that you have a license key available, and prompt you to automatically retrieve it. You will not have to follow any of the further instructions in this section (the next few paragraphs up to the next heading).

If that does not happen, you can instead click the **Request License Key for your Organization** button in the Evaluation and Licensing window. After asking you a question about whether you have paid in the last 12 months, that normally brings up an email, addressed to Software4Nonprofits.com, requesting the license key. If desired, you can add any further comments to this email, then [send it](#). (If you have not yet paid, it gives you options on how to do so.)

**Note:** The email request will **not** appear in your email program's Sent Mail folder.

You should receive an email response, within 2 business days, but usually much sooner. This response will explain what to do. Basically, the email contains a two-line key, consisting of numbers and letters. In the Evaluation and Licensing window, click the **Install License Key for your Organization** or **Install Updated License Key for your Organization** button. That



brings up the Install License Key window. You will need to copy the two-line key out of the email you received (by highlighting it with your mouse and pressing Ctrl+C, i.e. hold down Ctrl and press C) and paste it into the entry field in this window (by pressing Ctrl+V). Click the **Accept Key** button, and it should install your license key, and change DONATION from an Evaluation version to a full version, and/or update the email support and upgrades eligibility date.

#### DONATION is Subscription Software

Any users of the [OnDemand](#) version of DONATION, and users of the Standard or [Local Network](#) versions who have made a payment in 2022 or later, are using subscription software. As such, the program requires Annual Fee payments if you wish to keep using it in each successive year, since you are getting continued value from it.

The only exceptions to that are the legacy [Lite](#) version, and Standard version with up to 50 donors with donations, which are free.

The subscription payments for the versions other than Lite or free Standard are actually enforced by the program, for all users of the OnDemand version, and all users of the Standard or Local Network versions who have paid in 2022 or later and also upgraded to Release # 5.00 or later of DONATION. For all of those users, the program will start warning you as you get to the end of your 12-month payment period, and will stop working when it expires (after an extra 30-day grace period). It will start working again when you pay your Annual Fee again and get an updated license key, and your data will of course still be there!

#### License Keys are Connected to Organization Names

Your license key is partly based on your Organization Name. If you change the name of your organization in the **Maintenance** ⇒ **Organization Info** window, the program will give you a couple of messages telling you that it is inserting that new name into your license key file. Please also [email us](#) to inform us of any significant changes to your Organization Name, for our records.

If you use **Database** ⇒ **Switch Databases** to create or switch to additional databases for other organizations, or **Backup/Restore** ⇒ **Restore Database** to restore a database with a different organization name in it, you may need to obtain another license key for the different organization names. There is no additional charge for maintaining databases for more than one organization on the same computer. (Users of the Standard version will have to pay at the Local Network version rate if they have more than 5 databases, though they do not have to switch to that version.)

If you need to [move the program to another computer](#) for the same organization (or, for instance, rebuild your computer after a hard disk crash), you can use the same license key for that other computer. The same applies if you use DONATION on two computers, and [transfer your database](#) between computers. If you no longer have the email containing the license key, just request it again.

#### Eligibility for Upgrades and Support / Annual Payments

When you make your Annual Fee payment, you are then eligible for upgrades or support for one year from your payment date, which is the date we received your cheque, or the date you

paid online. If you pay before your support expiry date, the new expiry date will be a year from the current expiry date. The expiry date for your eligibility for upgrades and support is part of the license key that you install. To see your expiry date, use **Tools** ⇒ **Request or Install License Key**. It will be displayed in the window that comes up.

After making any payment, or being informed for any other reason that your eligibility period for support or updates has been extended, if you have at least version 4.04 of DONATION and an active Internet connection, normally when you start the program it will detect that you have a license key available, and prompt you to automatically retrieve it.

Otherwise, you can use the **Request License Key for your Organization** button on the Evaluation and Licensing window to request an updated key. Installing this updated key will inform the program that your eligibility for support and updates has been extended appropriately, and will allow it to accept updates.

## 2.3 Sending Emails from the Program

A few places in the program need to send an email to Software4Nonprofits.com. Two of those places are related to [software licensing](#), and are for requesting a License Key for your organization, or requesting an Evaluation Extension (for longer than the normal 60-day evaluation period plus grace period).

(Other email sending in the program, such as for [emailed backups](#) and emails to donors, is based on the [settings](#) set up with **Maintenance** ⇒ **Email sending Configuration**.)

When you use either of those licensing options mentioned above, a window such as the following comes up:

Send Email

Use this window to send an email to Software4Nonprofits.com in order to request your license key.

From: Name: Cooperstocks at Software4Nonprofits Email: info@software4nonprofits.com

To: info@software4nonprofits.com

Subject: DONATION License Key Request

Body: Please issue a license key for DONATION to:  
 Organization Name: Your Organization  
 Address Line 1: 100 Main St.  
 Address Line 2: Anytown USA

Additional Comments (optional):

Please use one of the following options, and the Send button, to send this email:

Use this default option if you have a connection to the Internet on this computer:

☒ Send this exact email using a web form on the Software4Nonprofits.com web site

Use this option if you DON'T have a connection to the Internet on this computer:

☐ Copy this email to the clipboard, so that you can send the email manually

Send

The Subject line and Body of the email will already have been filled in for you with the required contents, and are not editable.

Note: one of the things that is displayed in the Body of a license key request is your Organization Name, as taken from **Maintenance** ⇒ **Organization Info**. If that is not exactly the way you want it to appear on your receipts, you must first go back and change it in **Maintenance** ⇒ **Organization Info** before you make a license key request, because the license key needs to correspond exactly to your Organization Name, both in the spelling and in the capitalization.

When you are using this window to send an evaluation extension request, the optional Additional Comments field shown above is changed to a required Reason for Request field, so that you can inform us of why you need the extension.

When you are using this window to send your Registration information, the Subject and Body fields are *not* editable - they are determined by what you put into the Registration window. And there is also no Comments or Reason for Request section.

There are two options for how to send the email:

1. **If you have an Internet connection on your computer:** Use the default radio button option, "Send this exact email using a web form on the Software4Nonprofits.com web

site" (which is already selected for you), and click **Send**. That will invisibly send the contents of the email to a form on the Software4Nonprofits.com web site, which in turn actually sends a real email to us.

For this option, you also need to fill in the From Name and Email, at the top of the "Send Email" window, changing them from the default values ("Your Name" and "YourEmail@Address.com") that may come up when the window opens. However, it will re-use any previously used From Name and Email address. If this window hasn't been used before, the program tries to determine your Name and Email address from an Outlook, Outlook Express or Thunderbird profile if you use one of those email programs.

**Note:** The email request will **not** appear in your email program's Sent Mail folder after you send it this way.

2. **If you DO NOT have an Internet connection on your computer, or the Send in the previous step fails for any reason:** In this case, you will have to send the email more manually. Select the radio button "Copy this email to the clipboard, so that you can send the email manually", then click **Send**. (You don't have to fill in the From Name and Email for this option.)

What this does is put the contents of the email into the clipboard (the place Windows uses for doing Copy and Paste). After this, please follow one of these two sets of steps to send the email:

a) If you **do** have Internet access on this computer, and the **Send** in Step 1 above just failed:

- Open up your email program, or connect to your web-based email (like Hotmail, Gmail or Yahoo mail), and start a new email.
- Paste the email from the clipboard into the body of your new email by pressing **Ctrl+V** (hold down Ctrl and press V) or using the **Edit ⇒ Paste** menu option in your email program.
- The email that you have pasted in includes the To: address and the Subject line. Copy those out of the body of the email into the appropriate places in your email that you are sending.
- Send the email.

b) If you do **not** have Internet access on this computer:

- Open up any program that you can save a text file in, such as Word or Notepad, on your computer.
- Paste the email that is on the clipboard into that program, by pressing **Ctrl+V** (i.e. hold down Ctrl and press V) or using the **Edit ⇒ Paste** menu option in that program.
- Save that into a file (say, Email.doc, if you are using Word).
- Copy that file onto something that you can take to another computer that does have an Internet connection, such as a USB memory key.
- On the other computer that has the Internet connection, open up that file from the USB memory key.
- Highlight the contents of the email with your mouse, then press **Ctrl+C** or use the **Edit ⇒ Copy** menu option to copy it to the clipboard.

- Open up your email program, or connect to your web-based email (like Hotmail, Gmail or Yahoo mail), and start a new email.
- Paste the email from the clipboard into the body of the email that you have started, by pressing **Ctrl+V** or using the **Edit ⇒ Paste** menu option.
- The email that you have pasted in includes the To: address and the Subject line. Copy those out of the body of the email into the appropriate places in your email that you are sending.
- Send the email.

There is actually a third option, if you don't have an Internet connection on your computer. Just go to another computer that has an Internet connection, and manually type in at least roughly the same email that was displayed in the "Send Email" window, and send it to the same To: address that was displayed (info@software4nonprofits.com). However, please be very careful to include your **exact** Organization Name from **Maintenance ⇒ Organization Info**, with the correct spelling, capitalization and punctuation, because as mentioned above, if this does not match, your license key that we send back to you will not work.

## 3 TECHNICAL SUPPORT

### 3.1 Technical Support

There are three ways that we would recommend for resolving problems with the DONATION program, and to answer questions about it:

1. **Read the Manual:** Yes, we know many people hate reading manuals or help files. However, many of the questions we get asked can indeed be answered by carefully reading or searching in the manual or this help file. The help file has exactly the same contents as the manual. Don't forget that you can search in the help using the Index or Search tabs. (You get to the Help via the **Help = Contents and Index** menu option on the main window, or the **Help** button on virtually every other window in the program.)
2. **Check the FAQs:** There is a Frequently-Asked Questions page on the web site, at <https://software4nonprofits.com/faqs/>.
3. **Email us directly**, using the Contact Information below. Please send as much detail about possible about your problem, with screenshots where appropriate. Please **do not** send camera photos for screenshots: they are enormous attachments and often very hard to read. [Click here](#) for instructions on screenshots.

We have found that email almost always works better than phone, for several reasons. First, you don't have to catch us at a given time. Second, it is better for handling details, especially if there are a lot of details in our reply to you - you will have them in writing, to work through. And finally, with email we both have a record of the conversation, which we can look back on later if necessary. For this reason, only email support is included in with standard payments.

#### **Support Policies**

Personal email support is only available to users in organization who have paid for the program or purchased an annual support and updates renewal within the last year, or are still in their initial 60-day evaluation period plus grace period for the paid versions, or are using the free legacy [Lite](#) version or free Standard version with no more than 50 donors with donations.

**When you inform us of problems or have questions, we have the following policies, in order to optimize the use of our resources and give you the most efficient and effective support:**

1. We reserve the right to first ask you to read a relevant Help topic or web page that we recommend, if you have not already done so, and try the instructions included in it. If that does not work, you can get back to us and let us know where you are stuck.
2. We ask you to send us your problem or question by email, with appropriate [screenshots](#) where relevant, and we will normally respond by email, rather than doing support over the phone.
3. If you do phone us, you will almost always have to leave a message, and we will generally answer you by email.

4. If **we** decide that it would be more effective to answer you by phone, we will do so. We can also use remote control sessions to see what is happening on your computer, if we feel that would be a more effective way to resolve your problem than email.

### **Maximum Two Business Day Response Time for DONATION Support**

You should expect a reply to your emails within 1-2 business days. Please be sure to check your spam folders.

### **Contact Information**

You may contact us in any of the following manners:

**Email**            [info@Software4Nonprofits.com](mailto:info@Software4Nonprofits.com) (You can also send an email to this address  
(**Recommended**): by using the **Help** ⇒ **Email Software4Nonprofits.com** menu option, if you  
use a traditional email program like Outlook rather than webmail.)

**Web:**            <https://www.Software4Nonprofits.com>

**Mail:**           Software4Nonprofits  
                     16192 Coastal Highway  
                     Lewes DE 19958, U.S.A.

We hope that the program is so simple that there should be very few problems that this manual and a bit of experimenting will not solve, for most users.

Please be sure to report any bugs you feel you find in the program to us, and we will try to fix them (if we agree that they are bugs!) within a reasonable period of time. We would also be pleased to hear enhancement requests, to add or improve features. We cannot promise to add any such requests to the program though, only to consider them. Both bugs and feature suggestions can be reported through email.

### **DONATION Support Exceptions**

There are various things that are not included in our standard support, which you are eligible for because you are either still in the evaluation period for the program, or have paid in the last 12 months. For the unusual few things that we do not consider to be reasonably included in our standard support, we will ask you to pay an hourly rate if you need assistance.

Examples of things that would not be included in our standard support include (but are not limited to):

- Creating your own reports with SQL via the **Database** ⇒ **SQL Select** [window](#) (when you start from scratch there, without using the **Reports** ⇒ **Custom Report** [window](#), or want to make significant changes to the SQL from Custom Reports), or with an external SQL-based report designer.
- Data conversions from programs from which DONATION cannot currently automatically import data. (This is seldom necessary, because there are built-in conversions for several programs, and you can use the [Import Donors and Donations](#) window, and/or the [Import Donors](#) and [Import Donations](#) windows in other cases.)

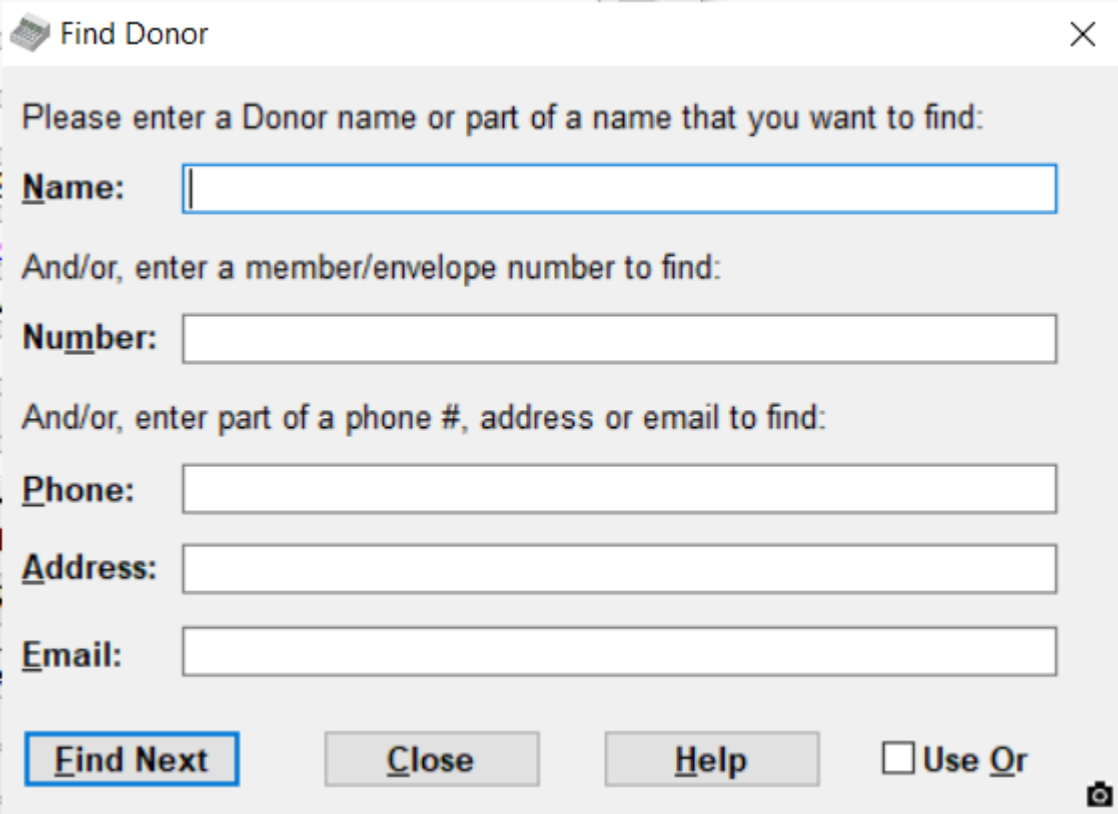
- Developing custom mail-merge receipts or letters in your own format (as opposed to making simple changes to the template formats we supply with the program.)

## 3.2 Screenshots for Tech Support Emails

When you are [contacting us](#) for technical support on a problem you are having in the program, it can often be helpful to include one or more screenshots. A screenshot is an image of the messagebox or screen you need help with.

### Screenshots of Program Windows

With most current versions of the program, most windows have a small camera icon in some corner of them, usually the bottom-right corner. Here's a sample:



Find Donor

Please enter a Donor name or part of a name that you want to find:

Name:

And/or, enter a member/envelope number to find:


Number:

And/or, enter part of a phone #, address or email to find:

Phone:

Address:

Email:

☐ Use Or 

If you hover over that camera icon, you will see a popup tooltip that says "Email Screenshot of this Window". If you click on the camera, it will take a screenshot, save it into an image file named Screenshot.bmp in your program's Temp directory, and bring up the following window that allows you to email it to us:



Send Email

Use this window to send an email to Software4Nonprofits.com in order to send a screenshot from DONATION to request our support.

From: Name: Your Name Email: youremail@yourorg.com

To: info@software4nonprofits.com

Subject: Screenshot from DONATION for Your Organization

Body: [PLEASE DESCRIBE WHY YOU ARE SENDING THE SCREENSHOT HERE]

-----

Your Organization  
100 Main St.  
Suite 100  
Anytown Ohio a1b 2c3

Attachment: C:\Users\ldcoop\AppData\Local\Temp\Screenshot.bmp

Send View

Please be sure to correctly fill in your Name and Email for replies, and replace that first line in the Body section with a description of what you were doing and what your issue is with the situation.

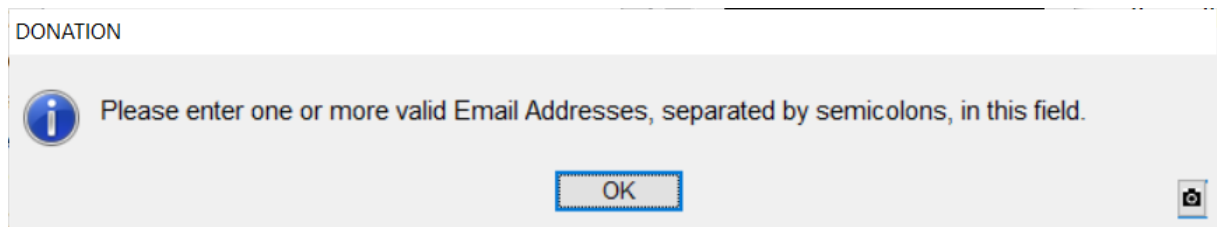
You can use the **View** button to the right of the Attachment file name to see the image that will be attached (the screenshot of the window on which you clicked the camera icon).

When you are ready, click the **Send** button to send the email to us. You do **not** have to have configured emailing in the program with the **Maintenance ⇒ Email Sending Configuration menu option** for this to work! You will also receive an email yourself, sent to the Email address you entered, showing what you sent to us, with the same attached screenshot.

Some windows do not have the camera icon, either because they are already windows for sending screenshots or other emails (like the one above) or because, for technical reasons, we are unable to add them. (File Open and File Save dialog windows are examples of ones we cannot add the camera icon to for technical reasons.)

### **Screenshots of Messageboxes**

Most messageboxes in the program have a small camera button at their bottom right corner, as in the following example that comes up if you try to save a donor with an invalid email address:



If you click that camera button, nothing happens immediately, but when you return to the program by clicking a regular button in the messagebox (like **OK** in this example), you will be prompted to email a screenshot of that messagebox using the window described above.

Some technical messageboxes that can come up in the program, generally ones that we do not expect to come up except in the case of unusual errors, will not have the camera button, but rather have text added at the end of their message such as the following:

**Note:** After you click a button in this messagebox, you will be prompted to email a screenshot of it to Software4Nonprofits, with your comments. You can cancel that window if you do not wish to do so.

That message should be self-explanatory - after you click a button on the messagebox, such as **OK**, it will take you to the window above for emailing us a screenshot of the messagebox.

In either case (using the camera button on a messagebox, or the technical messageboxes that tell you they will automatically prompt you to send the screenshot), you get to the window for sending the screenshot. Click **Send** in that window to send it to us, or **Cancel** if you don't want to send it to us. After that, the program will continue on appropriately, based on whatever regular button you clicked in the messagebox and its normal processing following that click.

For windows that do not include the camera icon, or if you are reading this help page online but using an older version of the program that does not have the camera icons on windows and camera buttons on messageboxes, you can use the following method, which also works in any other program you are using!

### **How to Email Screenshots without the Camera Icon**

You can take a screenshot of any single message box or window by pressing **Alt+PrtSc** (or on some laptops, **Fn+Alt+PrtSc**). Pressing that doesn't appear to do anything, or make any sound, but it puts that screenshot into the Windows clipboard. You can then paste that directly into an email with **Ctrl+V**, a right-click and pick **Paste** from a popup menu, or the **Edit ⇒ Paste** menu option in your email program. If that doesn't work in your email program, you can instead paste it into a Word document that you can send to us.

Please be sure to use **Alt** with **PrtSc**, so it doesn't take a screenshot of your whole Windows screen, and **please do not send camera photos** - both of those alternatives are generally huge, and much harder for us to read.

If you have any problems following the instructions using **Alt+PrtSc** in this section, you can watch our short video demonstration that is included on the [Demos and Samples](#) web page.

### 3.3 Who Are We?

Our business is generally referred to as Software4Nonprofits.

<https://www.Software4Nonprofits.com> is the web site. Cheques (which are generally no longer allowed!) must be made out to the official business name Cooperstock Software!

#### Who is Dan Cooperstock?

You may be asking yourself, "Who is this Dan Cooperstock, and why did he start this business of providing low-cost software to charities and churches?".

Dan is a computer programmer with an M.Sc. In Computer Science and over 40 years working experience. He has worked with PowerBuilder, which was used to create this program, for over 25 years.

Dan is also a Quaker, and has been both Treasurer and Clerk (chair) of his Quaker Meeting's Finance Committee, and chair of the Canada-wide Quaker organization's Finance Committee. Based both on this experience, and his experience writing and supporting DONATION since 1999, Dan has a solid understanding of the financial requirements of a small charitable organization.

Dan wrote the original DOS version of the DONATION program when his Quaker Meeting was using a commercial donations package, and he observed several drawbacks of it. He was not able to get the improvements he requested made. He talked to people that were using other packages, and none of them were completely satisfied. He decided that he would write his own program to handle donations, because he knew he could depend on its quality, and he could put in whatever improvements he wanted.

In 1998, Dan rewrote DONATION as a Windows program, and started giving it away for free (and later also accepting voluntary contributions) on the [www.FreeDonationSoftware.org](http://www.FreeDonationSoftware.org) web site. It was initially free for a few reasons. The first was just out of a desire to help other charitable organizations and churches with part of their work, without costing them any additional money. Another was that Dan just didn't want the bother of getting into a sideline business as well as his full-time job, and it was satisfaction enough to have his work used and appreciated.

In 2007, Dan took time off from his employment to do another complete rewrite of DONATION, and add a lot of long-requested features. During this time, Dan came to the conclusion that he could best serve the charitable sector by working full-time on DONATION, and thus he decided to start charging affordable prices for it, so that he could afford to do so. As part of that change, the domain name was changed from [FreeDonationSoftware.org](http://FreeDonationSoftware.org) to [Software4Nonprofits.com](http://Software4Nonprofits.com).

#### Other Staff

Information about our other staff can be found on the [About Us](#) page on the website.

## 3.4 How to Use Help

DONATION contains extensive context-sensitive help. To access it, from the program's [main window](#), use one of several options on the **Help** menu, including:

- **Contents and Index**, which opens this Help file, initially on the Index tab, from which you can search by topic titles or keywords. (You can also press **F1** to get there.)
- **Search by Topic or Keyword**, which actually just brings up a messagebox giving you instructions for how to do that, but also has buttons that take you either to the Help file where you can use the Index for searching, or to this How to Use Help help page for further instructions.
- **Help on ...**, with the specific area of the main window that your cursor is currently in added to the description, which opens the Help page on that topic. (You can also press **Shift+F1** to get there.)
- **How to Use Help**, which takes you to this page.
- Several others, which take you to specific commonly needed help pages, like **Quick Start**, **Technical Support Information**, **Move DONATION to Another Computer**, and **Revision History**.

Virtually every other window in DONATION includes a **Help** button, which takes you to context-sensitive help about how to use that window.

### Searching in the Help File

Once you are in the Help file, you will see that near the top left, there are four tabs you can select: Contents, Index, Search and Favorites.

- **Contents** displays a table of contents, which you can drill down into to find topics.
- **Index** displays a searchable index of all topics, with many topics listed in several different ways to make them easier to find.
- **Search** allows you to search on any individual words in the entire Help file, and shows you all topics that contain that word.
- **Favorites** allows you to add the current Help page to a list of your own favorite Help pages, or display a favorite page that you have previous added. (This is rarely used, by most users!)

The **Index** tab is usually the most useful, for looking up Help topics either when you already know the title (perhaps Software4Nonprofits has told you the title to look for), or to search by keywords that seem sensible to you. Just type the first word or words of that title, or a keyword, into the text field underneath the Index tab, and it will immediately scroll the index to the topics that start with what you have typed.

For instance, to search for information about Receipts in the program, start typing in "receipt" (upper or lower case doesn't matter), and it will scroll to show you all topics that start with "receipt". If the first one it finds, and highlights, appears to be the one you want, just press **Enter** to display it. If you want to see one lower down the list, just double-click on it to display it.

If you can't find what you need on the **Index** tab, try the **Search** tab, to search on individual words. If that doesn't work, contact [Technical Support](#) for assistance.

### Links in the Help

Just like on web pages, Help pages often contain hyperlinks to other related Help pages, usually shown in blue and underlined on most systems. Just click a link to go to the Help topic it points to. Also as with web pages, there are **Back** and **Forward** buttons at the top left of the Help viewer, to navigate back to previous Help topics you clicked through from etc.

## 4 DOCUMENTATION STANDARDS

### 4.1 Documentation Standards

Within this document, when referring to menu options on the menu of the main program window, we will use the notation **File** ⇒ **Exit** to refer to picking the File menu, then picking the Exit option on that menu.

All names of menu options, buttons (for example "**New**"), and keys on the keyboard (for example **F10**) will always be shown in boldface.

In a few pages there are optional instructions for executing commands in a Command Prompt window, editing SQL statements etc. Those instructions will be shown in `courier font like this`. (However, most users will never have to do anything like that.)

## 5 INSTALLATION INSTRUCTIONS

### 5.1 Installation Instructions

#### Installation

The program is distributed as one executable installation file, doninst.exe for the full installation or donupdt.exe for an upgrade to a new version. (For the [Local Network Version](#) of DONATION, for use by multiple users on a local-area network within one organization's office, it is doninstNetServer.exe or doninstNetClient.exe.) We will presume that you have downloaded that file from the [DOWNLOAD](#) page on the program's web site. After you have downloaded that file, run it. Just follow the prompts, and it should be quite straightforward. [Contact us](#) if you have any problems. For more details, see the [Installation Instructions](#) page on the program's web site.

When you are done with the Setup, look on your desktop. There should be a new cash-register icon there for DONATION. Double-click that icon to run DONATION. If all has gone well, you will now be running the program.

Users of the [OnDemand](#) version do not have to install DONATION directly, but rather just a small OnDemand client program.

#### Initial Startup

On your first startup, the program will ask you whether you are a first-time user, or whether you are an existing user who wants to start by restoring a backup DONATION database from a previous installation of the program on the same or another computer. Normally you would leave it at the default setting, which is for a first-time user, and click OK.

If you selected the option to restore a backup database, see [Restoring Backups](#) for more detailed instructions.

In the more usual case where you selected the option for new users, the program will prompt you for three things before you can start entering donors and donations:

- the first year your will start entering donors and donations for, which defaults to the current year
- your organization's information (name, address, etc.). (This uses the option **Maintenance** ⇒ **Organization Info**, and if you need to make changes to this information in the future, you can come back to that menu option.)
- Setting up any donation categories you want to use. (This uses **Maintenance** ⇒ **Donation Categories**.) It defaults to creating one category called General.

Further details on these steps, and some additional steps you may want to take before you get started, are in the [Startup Options](#) page.

You should now be ready to start entering donors and donations! See the [Regular Operating Procedures](#) page for an introduction to your daily activities.

#### Setting a Shortcut Key for Starting DONATION

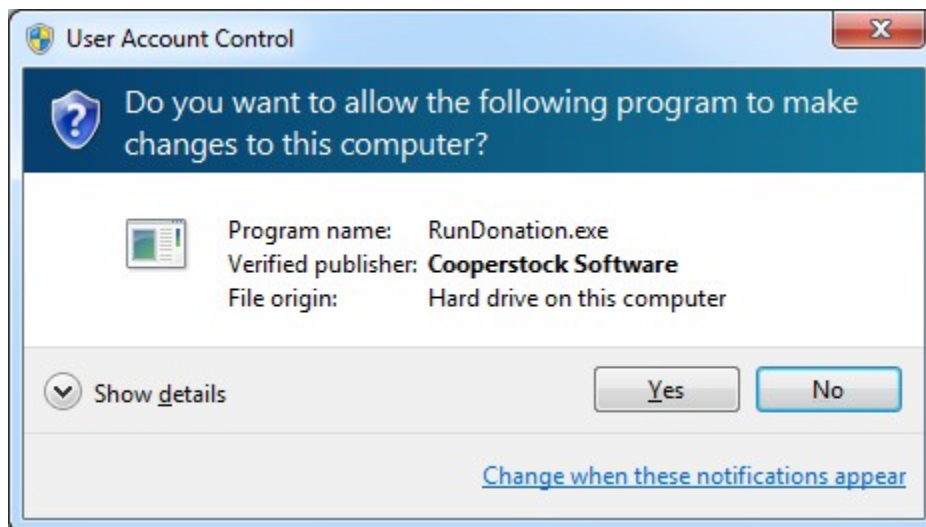
If you wish, you can set up a keystroke such as Ctrl+Alt+D to start DONATION, without having to find and click or double-click its icon on your Desktop. ("Ctrl+Alt+D" means to hold down Ctrl and Alt and press D.) To set that up, right-click on the Desktop icon for DONATION, and pick Properties from the popup menu. Click into the "Shortcut key" field with your mouse, then press any letter alone for a Ctrl+Alt letter combination (for example press "D" for Ctrl+Alt+D), or press any other combination you want to use, like say Ctrl+Shift+D. It will be displayed in that field. (Ctrl+Alt+D displays there as "Ctrl + Alt + D".) Click **OK**, and that shortcut will be saved. You should then be able to use it, even when other programs are displayed on your screen.

The only issue with Shortcut keys is you have to make sure you are not using a key combination that another program you use uses as a hotkey for one of its normal actions. However, since very few programs use the type of key combinations that the "Shortcut key" field accepts (you have to use at least two of Ctrl, Alt, and Shift), this should not be a problem.

Prior to version 3.33b, any time you re-installed DONATION, any shortcut key you had set up in this way would be lost. Now, however, it is retained.

## 5.2 Running as an Administrator

Prior to version 3.30 of DONATION, Windows XP users were recommended, and Windows Vista or Windows 7 or 8 users were required, to run DONATION as a Windows Administrator account. In addition, under Windows Vista or Windows 7 or 8, if you had the Windows User Account Control feature enabled (the default from Microsoft), you would always see a message box like the following that you had to click **Yes** on in order to run DONATION:



In version 3.30 and later, however, this has all changed. DONATION can be run by an Administrator or non-Administrator user, and the User Account Control prompt does not come up. The issues in previous versions of DONATION that required it to be run as an Administrator have mostly been worked around in one way or another, without eliminating any features.

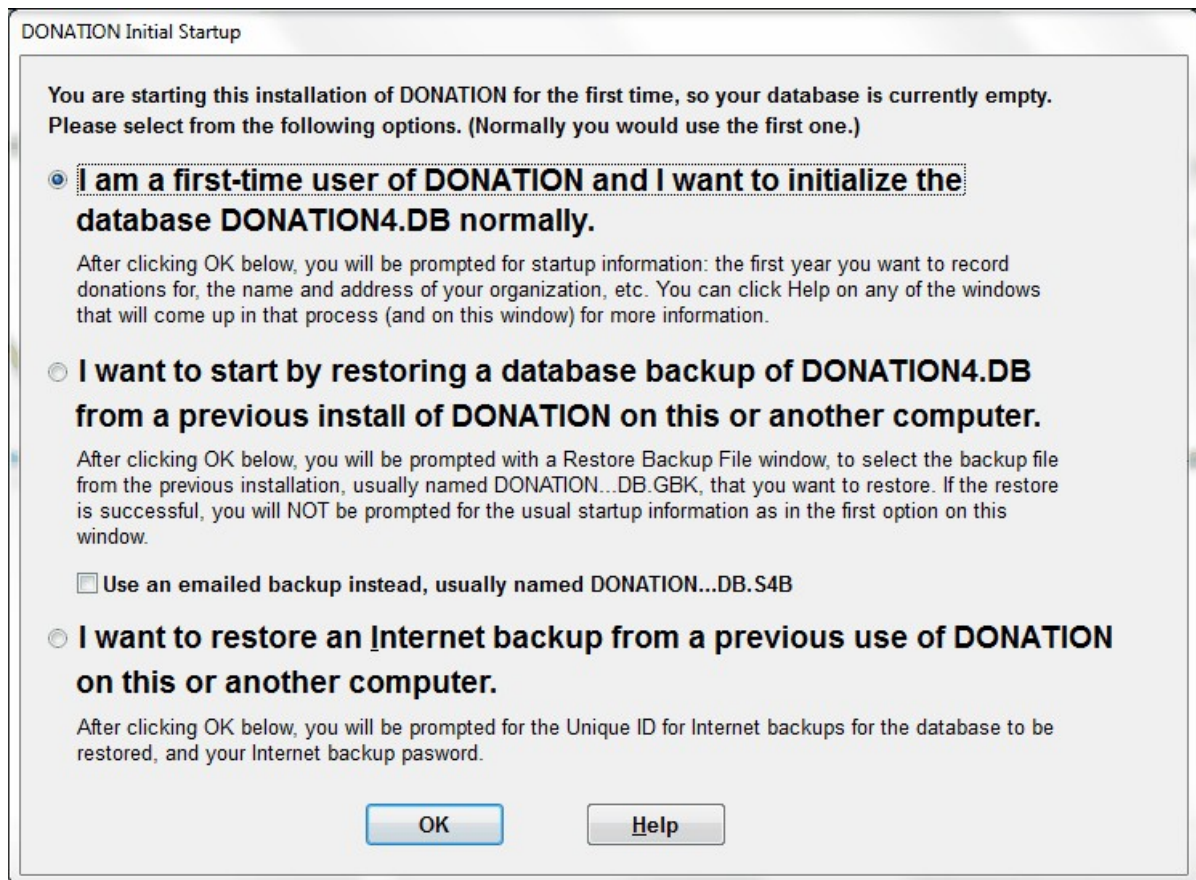


## 5.3 Startup Options

If you have already finished the initial setup of DONATION and gotten to the [main window](#), please continue reading this Help page at the section on [Passwords](#).

### Initial Startup Window

The first time you start DONATION after you install it, the program will show you the following window:

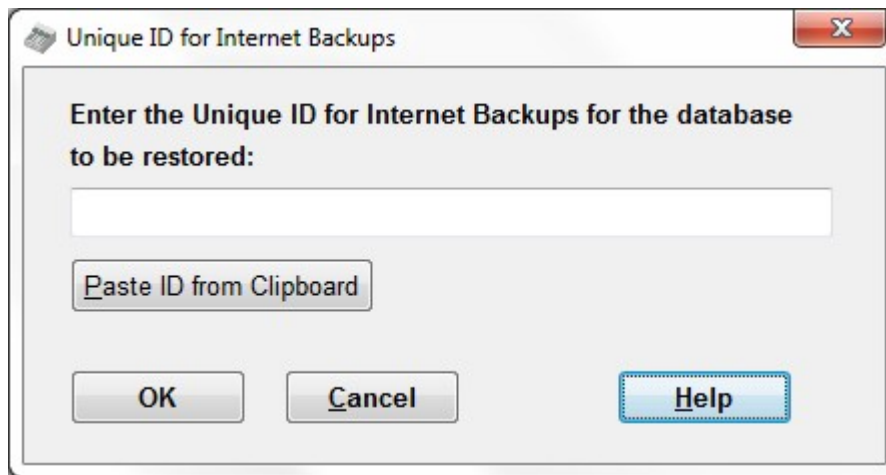


It is mostly self-explanatory, if you read it carefully. New users, whose organization has not used DONATION before, should stick with the first option (the default) and just click OK. Users who have a backup database from a previous installation, either because they have to re-install after getting a new computer or having their computer rebuilt, or because they are transferring the program from another user in their organization, should pick the second radio button option (or 3rd one if their organization had been using Internet backups, and they know the appropriate details) and click OK.

If you selected the 2nd option, to restore a backup database, you can see [Restoring Backups](#) for more details about the restore process. The further startup windows described in the section below will not be shown.

Note: If you do select this 2nd option, check the filename of the backup that you have received, or that was emailed to you. If it ends in ".GBK", do **not** check the checkbox below the text for this radio button. However, if the backup was emailed to you as an attachment, and it ends in ".S4B", **do** check the "Use emailed backup instead..." checkbox, and refer to the [Restoring Emailed Backups](#) page for more information.

If you select the 3rd option, to restore an Internet backup of your database, you can see [Restoring Internet Backups](#) for more details. You will be prompted for the Unique ID for Internet Backups that was used to make the backups, as well as the backup encryption password used (which you have to know!), as part of this process. If you reported that Unique ID to us when you first set it up, we may be able to supply it to you, if you don't have it. The following window will come up when you choose this option:



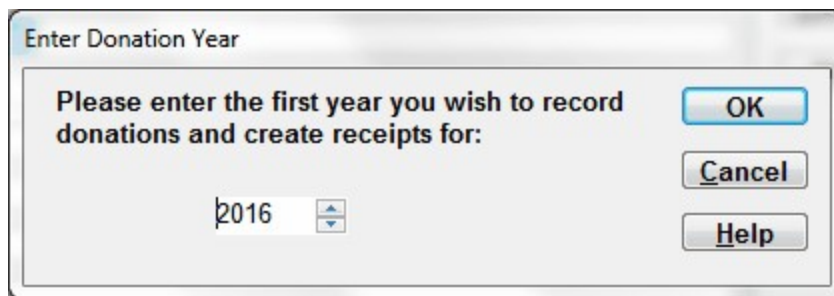
To get the Unique ID into this window, you have to first copy it to the Window clipboard from wherever you have it stored, then click the **Paste ID from Clipboard** button on this window to get it displayed here. (You can also *carefully* type it in manually, or directly paste it into the entry field.) After clicking **OK** and entering the Internet Backup password that it will next prompt you for, you will be able to select from the Internet backups - choose the most recent one. As with choosing the 2nd option in the window above, the further startup windows described in the section below will not be shown.

If the backup database you want to restore is named DONATION3.DB (or DONATION3.*something*), that is a database or backup from a very old version of DONATION (version 2.70b or earlier, from 2007 or earlier). The current version of DONATION cannot convert that, but if you contact [support](#), we can help you convert it.

### **Further Startup Windows**

In the more usual case where you selected the first option in either version's initial startup window, for new users, the program will prompt you with two or three additional startup windows before you can start entering donors and donations.

#### **First window:**



Enter Donation Year

Please enter the first year you wish to record donations and create receipts for:

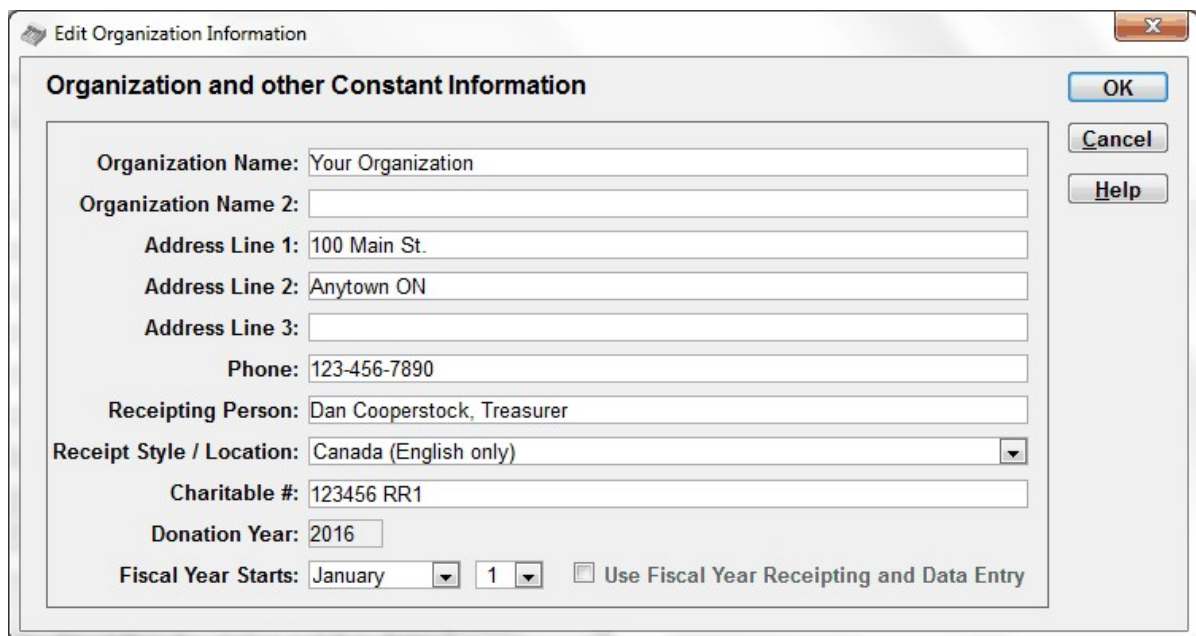
2016

OK Cancel Help

This defaults to the current year. However, if you have a backlog from before the current year, you can instead enter the prior year that you want to start on here. (For instance, suppose it is early in 2016, and you still haven't done anything with the donations from 2015. When it prompts for the year, enter 2015.)

If you are in a country where the tax receipting year is a fiscal year other than the calendar year, like Australia, New Zealand, or the United Kingdom, the year you select here will represent the fiscal year - from the fiscal year start in the previous calendar year, to the fiscal year end in the specified calendar year. See below for further details.

### Second window:



Edit Organization Information

**Organization and other Constant Information**

Organization Name: Your Organization

Organization Name 2:

Address Line 1: 100 Main St.

Address Line 2: Anytown ON

Address Line 3:

Phone: 123-456-7890

Receipting Person: Dan Cooperstock, Treasurer

Receipt Style / Location: Canada (English only)

Charitable #: 123456 RR1

Donation Year: 2016

Fiscal Year Starts: January 1 ☐ Use Fiscal Year Receipting and Data Entry

OK Cancel Help

In this window, you enter your organization's basic information (name, address, fiscal year start if different from the calendar year etc.). You can also come back later and change this basic organization information with **Maintenance** ⇒ **Organization Info**. For more details on this window, including a discussion of whether or not you should enter anything in the Charitable # field, see [Editing General Info](#).

If you are in a country where the tax receipting year is a fiscal year other than the calendar year, like Australia, New Zealand, or the United Kingdom, it's important to check the "Use Fiscal Year Receipting and Data Entry" checkbox here. See [Fiscal Year Data Entry and Receipting](#) for full details.

### **Evaluation and Licensing Window**

If you do not yet have a license key for your organization for DONATION, or have not yet installed it on this computer, and you aren't using the free legacy [Lite](#) version (which doesn't need license keys), the next thing you see will be the [Evaluation and Licensing](#) window. Please read the Help on that window for details. During your initial evaluation of DONATION, you can just click **Continue** on that window to go on to the main window.

### **Register the Program Window**

If you have not yet registered the program, or informed the program that you have already done so online or on another computer, you will also be prompted about registering DONATION, with the following window:

Register the Program

If you have not yet registered the program, you are strongly encouraged to do so.

By registering, you agree to be added to the mailing list, to which Cooperstock Software sends occasional emails with news about DONATION - mostly announcements of new versions.

Of course, if you decide not to use DONATION you may unsubscribe from our mailings at any time.

[Register Now](#)

[I have Already Registered Online or From Another Computer](#)

[Remind me Next Time I Run the Program](#)

[Help](#)

You may already have registered using the form on the web site, in which case you can click the second button in the window above. If you click the first button, [another window](#) will now come up prompting you to register.

### **Passwords**

There are several passwords you can set up in the program, for program entry with different permissions, and other purposes, with the **Maintenance** ⇒ **Change Password** sub-menu options. See the page on [Passwords in the Program](#) for full details.

For the OnDemand Version this is done differently, with login user names and passwords, not just passwords. You will use the OnDemand User Management application, and the DONATION program's **Maintenance** ⇒ **Administer All Users** menu option, to add additional users and set their permissions. See [OnDemand User Management](#) for full details.



### Other Initial Setup

Additional setup you may wish to do before you start using DONATION includes:

- Set up [Donation Categories](#) with **Maintenance** ⇒ **Donation Categories**. (You can do this as needed, by using the "<Add New>" option on the donation Category pull-down when you are entering donations.)
- Set up [Donor Categories](#) with **Maintenance** ⇒ **Donor Category 1** and **Donor Category 2**, if you wish to categorize your donors. (There is an "<Add New>" button for them as well.)
- Edit various [options](#) for what you see on the Main Window, with **Maintenance** ⇒ **Main Window Options**.
- Edit various [options](#) for the creation of official receipts, and mail-merging using the Letters menu options, with **Maintenance** ⇒ **Receipt Options**.

**See also:** the [Regular Operating Procedures](#) page for an introduction to your daily activities, and the [Main Window](#) page for a description of that window.

## 5.4 Multiple User Options

There are several ways to allow users on multiple computers to run DONATION for the same organization (i.e. on the same database). These same considerations apply whether you need different users on the different computers, or just one user who needs to use the program on multiple computers.

**Warning:** There is a major danger of having the program on only one computer, and not at least sharing backups with another user. The computer can die, and no good backups might be able to be found, or various other situations can occur where the data just cannot be passed on to another user. So we do recommend choosing a method of regularly sharing at least a database backup, if not the program itself, with at least one other person in your organization.

Each section below lists pros and cons of one of the options for how to do that, after describing the option.

### 1. Multiple Standard or legacy Lite Version Installs, Copy the Database Around

Prior to the release of the Cloud Storage Service, which builds on this way, and the OnDemand Version (both described below), the most common way was for each user to install the normal Standard (or free Lite) version, and to pass around copies of the database, via backup and restore. (Email or Internet backups can also be used.) That way, each user has a local copy of the database, and everything runs at full speed. **However**, only one user can be modifying the database in any way (data entry, receipting etc.) at a time, and you have to have a clear agreement who that is. **There is no way to merge changes made by two or more users on their own copies of the database** if they do not keep track of who has control of the database at any one time. Full details about this are in the topic [Transfer your Data between Computers](#).

Because of the danger of not coordinating the users correctly and having users make independent changes to different copies of the database, this is the most dangerous of the options to use!

**This option is only really recommended for users who do not have Internet access on their computers.**

There is no additional charge for installing the Standard version on multiple computers and using it in this way.

**Pros:**

- No extra cost, even for users with multiple databases for multiple organizations (up to 5)
- Runs extremely quickly.

**Cons:**

- Significant danger of two users making changes on their own copies of the database, which can't be merged.
- Some delays when you switch to using the program on one computer (have to restore a backup from somewhere) and when you prepare to switch to another computer (have to make a backup).

## **2. Cloud Storage Service**

This method is similar to the previous method, but it ensures that only one user can use the database at a time. It is only advised to use this if you have consistently reliable reasonably high-speed Internet on all of the computers that you want to use DONATION on.

This option completely eliminates the danger of not coordinating the users correctly and having users make independent changes to different copies of the database.

A quick explanation of this service is that the official copy of the database is always an [Internet Backup](#). When any user starts DONATION, the program takes control of the database, and downloads it to their computer. The user does the work on their computer, then when they exit DONATION, the program uploads the database back to the Internet storage, and releases control. When any one user has control, no other user can get control. (Other users can still access the database read-only, for lookups and reporting.) This prevents the sort of problems that can come up with the previous solution, if the users don't keep track of who has control of the database.

See [Cloud Storage Service](#) for full details.

There is no additional charge for installing the Standard version on multiple computers and using it with the Cloud Storage Service.

If all of the computers that you want to share the same DONATION database on are on the same local network (connected to the same modem or router via direct cables or WiFi) we would strongly recommend that you consider the Local Network Version of DONATION instead. Another very good alternative, if your users are not on the same local network, is the OnDemand Version. (See below for details of that option.)

**Pros:**

- No extra cost, even for users with multiple databases for multiple organizations (up to 5)
- Runs quickly
- No danger of two users making changes on their own copies of the database, which can't be merged.

- Additional users can access an up-to-date copy of the same database read-only, while one user who has control of it is editing data. (They will not yet see any changes made by the user who is editing.)

**Cons:**

- Problems can occur if your Internet goes down when you want to run DONATION, or particularly while you are running DONATION. Although this is very rare in our experience, in the latter case you could lose your work during that session.
- Short delays starting and exiting DONATION, as it downloads and uploads the backup at those points. However, if your computer was the last user, no download on startup is required, and if you don't make any changes, no upload on exit is required.
- While this version is very reliable, it does have more "moving parts" than other sharing methods so occasionally users have problems, such as if one user changed the password and didn't tell the other users.

### **3. Local Network Version**

The [Local Network Version](#) of DONATION is designed to be used on a local-area network (several computers within your office, connected to the same modem or router via direct cables or the same WiFi source). In this case, there is only one copy of the database, on the computer running the Local Network Server Version of DONATION, and all of the other computers run the Local Network Client Version of DONATION and access the database that is on the Local Network Server Version's computer.

Multiple users can access the program simultaneously with the Local Network Versions, though there are a few limitations as to what they can do when there are simultaneous users, explained in its Help topic.

The advantage of using the Local Network Versions over multiple Standard or legacy Lite versions using the very first option above is that there is only one copy of the database. Thus there is no chance of having problems with multiple people making changes on multiple copies at once, and being unable to merge those changes.

On a local area network, the program should run very quickly regardless of whether you are on a computer running the Local Network Server Version of DONATION, or the Local Network Client Version.

Although the Help on the Local Network Version describes a couple of ways to have additional occasional users access it over the Internet, it is not really designed for that. The Cloud Storage Service described above, and the OnDemand Version described below, are generally better alternatives, if your computers are **not** on the same local network.

**Pros:**

- There is really only one copy of the database file, so there are no real dangers.
- Multiple users can use the program simultaneously, all making changes to the data.
- Works very quickly when used on a local network, with no delays on startup or exit.

**Cons:**

- More expensive than Standard (same price as the OnDemand Version)
- Somewhat more complex initial setup and maintenance
- Much slower if run over the Internet instead of a local network (though we do not recommend doing that with this version)

- The computer running the Local Network Server Version has to always be turned on (though not necessarily logged in) for the Local Network Client Versions to work.

#### **4. Remote Access to One Computer running DONATION**

Another way to do this is with a remote access solution, such as Windows Remote Desktop connections, or a 3rd-party program such as [LogMeIn](#), [TeamViewer](#) or [AnyDesk](#). With this setup, there would only be one installation of the Standard (or legacy Lite) version of DONATION. With remote access, a user on another computer can view and work on the desktop (screen) of another computer, so if you can set this up, remote users can access the computer running DONATION and run it remotely. Of course, this would only be one user at a time, and that computer has to be left on at all times during which other users might need to access it remotely. Also, this is exposing everything on that computer running DONATION to the remote user, not just the DONATION program itself.

This solution could also be used for occasional remote access to one of the computers running the Local Network Versions of DONATION.

Setting up Windows Remote Desktop for use over the Internet can be tricky - like the solution for using the Local Network Version of DONATION over the Internet, it requires that the computer running DONATION have an Internet-accessible static IP address or hostname. Also, the port it uses (3389) must be opened up on your firewall, and for port forwarding in any router. (See the instructions under [Local Network Versions](#) for how to set that up, for its port number, and then you can use the same basic idea for this port number.)

However, there are a number of other remote access products out there, such as [LogMeIn](#), [TeamViewer](#) and [AnyDesk](#), that are much easier to set up, and do not require the computer running DONATION to have an Internet-accessible static IP address or hostname, or for you to open any ports on your router or firewall.

**A similar solution that will often be better than this, and require less setup, is the OnDemand Version described below.** Unlike this option, it allows for multiple simultaneous users, and also runs on Apple Mac computers!

What remote access solutions do is transfer your keystrokes and mouse actions to the remote computer, and its screen to your computer. While they are usable over the Internet for limited amounts of work, they are always somewhat slower than having everything running on your computer, so you would have to test this and see whether it really seemed suitable for regular use.

##### **Pros:**

- There is only one copy of the program and its database file, so there are no real dangers.
- Most remote access solutions only allow a single user to be accessing the computer, so there are no dangers related to multiple users.

##### **Cons:**

- Depending on the speed of your Internet connection and the quality of your remote access software, will generally be noticeably slower than running on your own computer.
- Requires reliable high-speed Internet.
- Somewhat complex to set up initially.



**WARNING: Do not try to use DONATION with a remote access solution (other than our OnDemand version described below) that allows multiple users to access the program on the same computer at the same time - this could cause serious problems!**

## **5. OnDemand Version**

With this version, both the program and its data are installed on an Internet server ("in the cloud"), and you only have to install a small OnDemand Client program. That Client program securely accesses the program over the Internet, and transmits its screens, and your keyboard actions and mouse movements, back and forth. This is like an enhanced version of the Remote Access to One Computer Running DONATION method listed above.

Each user of this version for a given organization will have their own login user name and password required to access the program.

### **Pros:**

- You never have to install or upgrade the DONATION program itself - we will keep the program regularly updated for you.
- Up to 5 users can access the same database at the same time.
- There is only one copy of the database file, so there are no dangers of users making independent changes to independent copies of it, that cannot then be merged.
- The database is accessible from any computer on which you have installed the OnDemand Client program, **including Apple Mac computers** and Android and iPad tablets. (Tablet use is only recommended for very limited lookups and reporting.)
- Your existing database from other versions of DONATION can become an OnDemand Version database, or brought back down if you decide to go back to another version, using the normal database backup and restore mechanism.
- You can assign each user their own login user name and password, and permissions.
- Almost as fast as the Standard or Local Network versions, as long as you have reasonable fast Internet.
- No extra charge for additional databases.
- Fewer "moving parts" than the Standard version's Cloud Storage Service.

### **Cons:**

- More expensive:
  - Same price as Local Network Version
  - Because this is a service (not just software installed on your computer), annual payments are required to keep using it, unlike other versions were (prior to 2022).
- Even with a very fast Internet connection, this version is always a little bit slower than regular installed versions.
- Requires reliable high-speed Internet.

Full details on this version are in the Help topic [The OnDemand Version of DONATION](#).

## **6. Remote Database Version (Previously called the Web Network Version)**

This version was discontinued on August 1, 2021, and is no longer available for sale or use.

More details on this version are in the Help topic [The Remote Database Version of DONATION](#).

## **7. Using the Database on a USB Memory Key**

This is quite similar to the first option above, but you have each computer [use the database on a USB memory key](#), and bring your single USB memory key containing the database around to each computer that needs to use it. That way there is only one copy of the database, and as with the Cloud Storage Service, there is no danger of modifying different copies of the database on different computers.

**We really do not recommend this option, because it has too many disadvantages and dangers. Please see the "Cons" listed below for details.**

This is probably most appropriate for the situation where there is really only one user, who needs to use the program on more than one computer (perhaps at home and at the organization's offices), you are quite computer literate, and you do **not** have reasonably fast Internet service on all of your computers running DONATION, or perhaps don't have Internet access at all on at least one of the computers.

There is no additional charge for installing the Standard version on multiple computers and using it in this way.

### **Pros:**

- Fairly simple to set up
- No extra cost
- Runs quickly
- No danger of two users making changes on their own copies of the database, which can't be merged.
- No delays starting or exiting DONATION, except for having to first put in the USB memory key, and safely remove it afterwards.

### **Cons:**

- **This should only be used by people who consider themselves to be quite computer literate, because a number of problems can go wrong that require manually navigating to and editing the program's INI file.** In particular, problems can occur if your computer gets confused and the key shows up with a different drive letter from where it normally shows up.
- You always have to have that USB memory key with you to run DONATION.
- You need to be sure you have additional backups elsewhere, in case that USB drive dies.

## **8. Sharing the Database with Dropbox, Google Drive, Microsoft OneDrive etc.**

This is just listed here as something you absolutely **should not do!** Do not try to move the database file itself to a 3rd-party cloud storage location such as Dropbox, Google Drive, Microsoft OneDrive, Sync.com etc. It is just a recipe for disaster, because there is no way to prevent multiple users from accessing it at the same time, and there is a real potential for damaging your database because of the way those services work.

There is nothing wrong with using a shared cloud storage location as a place to save your database **backups**, though, and you could use those backups with the techniques in option (1) above, [Transfer your Data between Computers](#), though it still has that option's significant disadvantages.

### **Multiple Users with Multiple Databases**

The program allows you to have multiple databases for multiple organizations, through the **Database ⇒ Switch Databases** [menu option](#), at no extra charge. If you have multiple people using the program (which we call "users"), all of whom regularly use the multiple databases, that is fine.

However, if there really is just one main person using each database, who is different from the main person using each other database, and other users never (or only rarely) access that database, that is not the intention of our allowing this to be done at no extra charge. In that case, we would expect that the main user for each organization / database would [register](#) and pay for the program separately.

For instance, if one user uses DONATION for two organizations, but occasionally another user needs to look at both of those databases, or take over while the first user is away on vacation, that's fine.

But suppose you have one primary user using DONATION for one organization, and a different primary user using DONATION for another organization, with perhaps occasional switching places while one or the other is on vacation. If they have only one registration and payment, and they are using multiple databases through **Database ⇒ Switch Databases** and using one of the multiple user options discussed above, that would **not** be considered to be a reasonable application of our pricing structure. They should register and pay separately.

## **5.5 Local Network Versions of DONATION**

**Note:** These versions used to be called just the "Network Version", but are now called "Local Network Versions" to make it clearer where they can run.

The Local Network Versions of DONATION can be installed on multiple computers on a local area network (usually in your organization's office). With the Local Network Versions, you have only one copy of the database, on a computer running what is called the Local Network Server Version of DONATION, and all other computers run what is called the Local Network Client Version of DONATION, and access the database that is on the Local Network Server Version's computer. Multiple users can run DONATION and make changes to the database simultaneously.

While there is a way to use the Local Network versions for computers over the Internet (for instance, home and office), it is not recommended for that use. One possible exception would be if your users are almost always within the same local network, but just very occasionally someone needs to use it over the Internet. [See below](#) for details on options to do that.

There are several better ways to run ACCOUNTS on multiple computers over the Internet, detailed in the [Multiple User Options](#) page. Using separate Standard versions with the [Cloud Storage Service](#) and the [OnDemand Version](#) are both good options.

This page is only about the Local Network Versions, however.

### **Local Network Server Version**

The **Local Network Server** Version is installed via the **doninstNetServer.exe** installation program, which you download from the [DOWNLOAD](#) page on the website, at

<https://software4nonprofits.com/download-all/>, by clicking the Download Local Network Server button on that page and following the prompts. As part of the installation of DONATION, this installs the Firebird Server database software, which runs as a service on your computer, and which can make access to the database available from other computers as well. The database file must also be on a local hard drive of the computer that the Local Network Server Version is installed on. Only one computer on a network should have the Local Network Server Version installed on it.

The computer on which the Local Network Server Version of DONATION is installed does not have to be what is conventionally called a network server computer, or be running a special Windows Server operating system, although that certainly works. Most commonly, it should just be the computer belonging to the main user of DONATION.

If you are upgrading from the Standard version to the Local Network Versions, the easiest thing to do, assuming the Standard version was already on a computer on your network that you want to keep using DONATION on, is to just upgrade that computer to the Local Network Server Version, by running **doninstNetServer.exe** on it. If you have paid for the Standard version, there will be a fee to upgrade, which varies depending on when you last paid. [Contact us](#) for details.

Note: you do not have to share the drive or directory that contains the database file (normally Data\DONATION4.DB, under the program's [Data Directory](#)). The Firebird Server database does not require file sharing for it to work - it only uses TCP/IP.

#### Local Network Client Version

The **Local Network Client** version is installed via the **doninstNetClient.exe** installation program, which you also download from the [DOWNLOAD](#) page on the website, at <https://software4nonprofits.com/download-all/>, by clicking the Download Local Network Client button on that page and following the prompts. This can be used on a second or further computer on the same network that a Local Network Server Version was installed on, and it accesses the database that is on the computer that the Local Network Server Version was installed on.

When you install this version, it will prompt you to specify the network name of the computer that the Local Network Server Version was installed on.

To be sure you have the correct computer name of the computer running the Local Network Server Version of DONATION, do the following. On the computer with the Local Network Server Version of DONATION installed on it, run DONATION, and use the **Tools = Network Client Information** menu option. It will give you the exact information needed by the prompt for the "Computer Running Network Server" in the Local Network Client Version's installation program. If that is not entered correctly, the client version will not be able to connect to the server version. On that **Network Client Information** window, you can click **Print** to print the information out, or **Open in Word** to open the information in a file in Microsoft Word, which you could then take to the client computer and use for cutting and pasting if necessary.

**Important:** The Local Network Client Version will not be able to run, and will give error messages during its installation, unless the computer on which the Local Network Server Version was installed is also running and logged in (though DONATION doesn't have to be running on it).

If you ever run the Local Network Client Version of DONATION and it can't open the database, the program will give you an option to correct the name of the Local Network Server Version's computer. This is useful if you are moving the Local Network Server version to a new computer.

### Firewalls

If you are running a firewall on the computer running the Local Network Server Version, you will usually have to make an adjustment, so that the Network Client computers can access the database on it, on port 3050. You will know you might have this problem if you get an error message during the installation of the Local Network Client Version (and/or when trying to run that version) that includes the words "Failed to establish a connection". (Alternatively, you could get that message because either the computer name or the directory and filename of the database file were specified incorrectly, when installing the Local Network Client Version.)

If you have this problem and are using the built-in Windows Firewall or Windows Defender Firewall on your computer running the Local Network Server Version of DONATION, you can set up an appropriate Exception as follows:

#### **For Windows 7 or 8:**

1. From the Windows Start Menu, select Control Panel.
2. In Control Panel, select Windows Firewall.
3. Assuming the Windows Firewall State is On (if it is Off, this isn't the problem!), click Advanced Settings on the left.
4. In the window that comes up, click Inbound Rules on the left, then New Rule on the right.
5. In the window that comes up, click Port, then Next.
6. Make sure TCP is selected in the next screen, and Specific Local Ports is selected. To the right of Specific Local Ports, enter "3050", without the quotes, in the entry field. Click Next.
7. Make sure Allow the Connection is selected in the next screen, and click Next.
8. You can leave all of the checkboxes selected in the next screen (though it's probably safer to uncheck "Public"), and then click Next.
9. Enter a Name for this rule on the next screen (for example something like "Firebird Server for DONATION"), then click Finish.
10. You can then close the Windows Firewall with Advanced Security window.

#### **For Windows 10 with Windows Defender:**

1. Right-click on the Windows Start Menu, and pick Settings from the popup menu.
2. Click on Updates and Security
3. In the window that comes up, click on Windows Defender on the left.
4. In the window that comes up, Click on Firewall and Network Protection.
5. In the window that comes up, click on Advanced Settings near the bottom.
6. At this point just follow steps 4 through 9 in the section above for Windows 7 or 8.
7. Close the remaining windows that you have opened.

For other versions of Windows, it should be something similar to one of the two sets of steps above.

If you are using different firewall software (not Windows Firewall or Windows Defender Firewall), the important thing is to allow incoming TCP accesses to port number 3050 on the computer running the Local Network Server Version of DONATION.

We're sorry, we cannot help you with figuring out how to make firewall changes on other security software. Please read the Help of that software to learn how to make this change, or consult your more general Windows or network support people for assistance if necessary.

#### Advanced Diagnosis of Local Network Client Connection Failures

If your Local Network Client installation doesn't work, first, be sure you have done all of the following:

- opened the firewall on the Local Network Server Version computer on port 3050
- done the installation on the Local Network Client Version using the information copied and pasted from the Word document you can get from the Local Network Server computer's DONATION program, using its **Tools** ⇒ **Network Client Information** menu option, and
- informed us of any error messages that came up when you ran **Tools** ⇒ **Network Client Information** (it does various checks to help make sure the client installs will work)

Once you have done all of them, here are some advanced techniques you can use to diagnose the program.

These instructions are for people who are comfortable with Windows, including using Command Prompt windows. (In almost all cases, though, none of this should be necessary!)

First, in a Command Prompt window on the Network Client computer, run:

```
ping servername
```

where *servername* is what is shown as "Computer Running Network Server" in the Network Client Information window referred to above. That should return several rows of reply information, or an error message. If there's an error message, it usually means that the server name is incorrect or somehow not visible on your local network. Consult your network support people to resolve that problem.

If that worked, try the following command:

```
telnet servername 3050
```

with the same *servername*. If that comes back with an error such as "'telnet' is not recognized as an internal or external command ...", you need to make the telnet program available on your computer. To do that, go into Windows Control Panel, then Programs and Features, then click the link for "Turn Windows features on or off". In the window that comes up, scroll down and find "Telnet client", click in the checkbox for it to turn it on, and press OK. Then you can go back to your Command Prompt window and try the above command again.

If port 3050 is available on that server computer, and not blocked by a firewall, you should get a blank screen. Press Enter a couple of times and it will come back to a command prompt.

If it fails with an error message, most likely that means the port is blocked by a firewall, or of course that Local Network Server computer might not be turned on! (In that case the ping would also have failed.)

If none of this allows you to resolve the problem, please [contact us](#) by email and inform us what you have tried and exactly what the results were, including the exact complete text of error messages you received, and we will work with you to resolve the problem.

### License Keys

When you receive license keys for the program, special license keys are needed if you are using the Local Network Versions (Local Network Server on one computer, Local Network Client on one or more other computers). The Local Network Versions of DONATION always allows up to five simultaneous users for the one price.

The same license key should be installed on all computers on your network on which you install DONATION, whether they are running the Local Network Server Version or the Local Network Client Version. This applies both to your initial install, and if you get an updated license key after any annual payment.

### Detecting your Version

If you are not sure which version of DONATION you are running, use **Help ⇒ About DONATION ...**, and it will tell you in the window that comes up.

### Simultaneous Users and Limitations

To be clear about simultaneous users, you are allowed to have one Local Network Server installation, and any number of Network Client installations. Multiple users can be running DONATION at the same time, accessing the same database.

While you can have simultaneous users running DONATION, there are some actions in the program that can only be run when you are the only user running DONATION. There are also some actions that can only be run from the Local Network Server installation. For instance, [Restoring](#) a backup database, [Validating](#) your database or creating a new database in the **Database ⇒ Switch Databases window** can only be done from the Local Network Server installation. And making [backups](#) behaves somewhat differently, depending on which version you are using.

Some actions can only be done when you are the only user running DONATION (whether on a Local Network Server Version or a Local Network Client Version) because we have judged that there is too much danger of conflicting or inconsistent data being put into the database if more than one person tries to do the same actions at the same time. For instance, converting data from other programs. In these cases, you will receive a message from the program informing you of why you cannot do that action at that time. To resolve the problem, ask other simultaneous users of DONATION to exit the program, and then try the action again.

In addition, only one user at a time can be [creating receipts](#), or doing other **Receipt** menu options that can affect receipts, although other users can still be logged into DONATION at the same time. If you do have multiple users wanting to create individual receipts at the same time, please be careful to do your printing (or saving to PDF, or emailing) of those receipts, then exit



the report viewing window, as quickly as possible. It's only after you exit the window viewing the receipts (or finish any other actions affecting receipts) that another user can do **Receipt** menu actions.

In some other cases, two or more users can do the same thing at the same time (for example creating or editing donors or donations on the main window), but in unusual circumstances, you may get an error message. For instance, suppose two users are simultaneously making an address change for the exact same donor. The first one that clicks Save will have their changes saved, but the second one will probably get a slightly technical-looking error message saying "Record changed between retrieve and update", and will not be able to save their changes. They will have to click Cancel to abandon their changes.

When you do have a Local Network Version allowing for simultaneous users, a Refresh button appears at the top right of the Donor List on the main window. Clicking that will reload the main window, to pick up changes made by other simultaneous users, for instance added or deleted donors, changes to donor names, changes to the lists of donor or donation categories, etc.

Although the DONATION program almost never crashes, if it does, or if a user running DONATION restarts or turns off their computer without exiting DONATION first or there is a power failure, a minor problem can occur. Any user on another computer that tries to run DONATION may get a message that the maximum number of simultaneous users has been exceeded, when it in fact hasn't. That's because the copy of DONATION that crashed, or wasn't exited properly when its computer was restarted, didn't have a chance to notify the Firebird Server that it had exited, and thus the Firebird Server thinks it is still using up one of your simultaneous users. Fortunately, this problem is easily resolved - wait two minutes and try again, and it will be OK, because indications in the Firebird Server that any given simultaneous user is using DONATION are automatically cleared after two minutes.

#### Switching Databases and the Local Network Version

If you are maintaining multiple databases for multiple organizations with the **Database ⇒ Switch Databases** [menu option](#), only the Local Network Server Version can create new databases. Once it has done so, users of the Local Network Client Version can also access those new databases.

However, if there really is just one main person using each database, who is different from the main person using each other database, and other users never (or only rarely) access that database, that is not the intention of our allowing this to be done at no extra charge. In that case, we would expect that the main user for each organization / database would [register](#) and pay for the program separately.

For instance, if one user uses DONATION for two organizations, but occasionally another user needs to look at both of those databases, or take over while the first user is away on vacation, that's fine.

But suppose you have one primary user using DONATION for one organization, and a different primary user using DONATION for another organization, with perhaps occasional switching places while one or the other is on vacation. If they have only one registration and payment, and they are using multiple databases through **Database ⇒ Switch Databases**, that would **not** be considered to be a reasonable application of our pricing structure. They should register and pay separately.



### Uninstalling the Local Network Server Version of DONATION

If you are running the Local Network Server Version of DONATION, and you decide to uninstall DONATION, an extra step may be required.

If you are sure you do not want to use DONATION again, and if in addition you are sure that you are not running any other applications that use the Firebird Server database software, you can uninstall the Firebird Server from Control Panel's Programs and Features tool. It will show as "Firebird 2.0.3" in the list of installed programs.

If you have version 3.11 or higher of DONATION, you may be prompted to uninstall the Firebird Server as part of DONATION's uninstall process. If you do get that prompt, and answer Yes, then you don't have to also separately remove it with Control Panel.

### Using Terminal Services Clients

Some users have asked about having the clients access a single Network Client installation via Terminal Services, rather than installing the Local Network Client Version of DONATION on their individual computers. If this would mean that each client would appear to have the same COMPUTERNAME (in its environment variables) that could cause very serious problems. The reason is explained above, where it talks about some features (including issuing receipts) that can only be done when only one user is running DONATION at a time. When each user's COMPUTERNAME is the same, no matter how many users are running simultaneously, the program will always think there is only one user, because that is how they are distinguished. So those actions that we have deemed to be dangerous if more than one user was attempting them at the same time will be able to be done by multiple users simultaneously.

So, the obvious conclusion is to not do that. If you are using Terminal Services, it must be done in a way where each user appears to have a different COMPUTERNAME.

### Using the Local Network Versions over the Internet

The Local Network Versions are designed to be run only over a local area network within one location. If you very occasionally have a user needing to access the system over the Internet, for instance from home or on the road, the easiest solution would be to use a [remote access solution](#) to remotely access one of your computers on your local network, over the Internet.

If that is not an option for you, it is also technically possible to have a computer with the Local Network Client version installed access the Local Network Version over the Internet. However, you will almost certainly need assistance from a network support person to get this working. (We cannot talk a person that isn't familiar with networking issues and router configurations through this!)

**If you need to do this regularly, we would strongly recommend instead considering the [Cloud Storage Service](#) of the Standard version, or the [OnDemand Version](#).**

The first requirement if you still wish to set up the Local Network Versions over the Internet this is that you have a computer (which could be a real server or a normal workstation computer or laptop) in your office, which can be accessed via a static IP address and/or an Internet-

accessible hostname, on which you can install the Local Network Server Version of DONATION. You will have to leave that computer always running (though DONATION doesn't have to be running on it) so that the other computers you want to access DONATION on over the Internet can access it.

If the computer you want to run the Local Network Server Version of DONATION on does not have a static IP address or Internet-accessible hostname, you can use free or inexpensive services such as [www.dyndns.org](http://www.dyndns.org) or [www.no-ip.com](http://www.no-ip.com) to set one up.

Next, as usual with the Local Network Version of DONATION, you need to follow the instructions above under [Firewalls](#), to open up your firewall on the computer running the Local Network Server Version, to allow incoming accesses on port 3050.

Assuming that computer is behind a router, you need to use the router's user interface (usually web-based) to allow for port forwarding of incoming requests on port 3050 to that computer running the Local Network Server Version of DONATION. Some router software may call that something like "enabling application support".

Once that is all set up, install the Local Network Client Version of DONATION on whichever other computers you want to install it on, as long as they have high-speed Internet access. Presumably this will be some of your users' home computers. When that installation program prompts for the hostname for the Local Network Server computer, give it the correct hostname, as discussed above. (You can alternatively give it the IP address, but only if that is a true static IP address.) If everything has been set up correctly, those remote instances of DONATION should then work, accessing the database on the computer in your office that is running the Local Network Server Version of DONATION.

Please note that because the data access is over the Internet, even with a high-speed Internet connection this will run significantly slower than the normal Standard version, or even the Local Network Client Version installed on another computer in your office. You will have to test this for yourself to determine how acceptable you think those speeds are. If you are not satisfied, you can use one of the other [Multiple User Options](#) instead.

In our testing, we were not able to also have additional Local Network Client Versions of DONATION within our own local area network work successfully accessing the Local Network Server Version's computer via its external hostname (which we established via [www.no-ip.org](http://www.no-ip.org)). We had to set it to the internal hostname of the Local Network Server Version's computer, and then it worked fine.

If you are going to use this Local Network Version setup over the Internet, you absolutely must put a password on your database, via the **Database ⇒ Change Password ⇒ Program Entry Password** menu option, and optionally also set the other passwords there if you use them. That is because anybody that knows the hostname of your Local Network Server Version's computer could install the Local Network Client Version of DONATION on their computer and access and modify your DONATION data, as long as they could get past any password prompt it gave them.

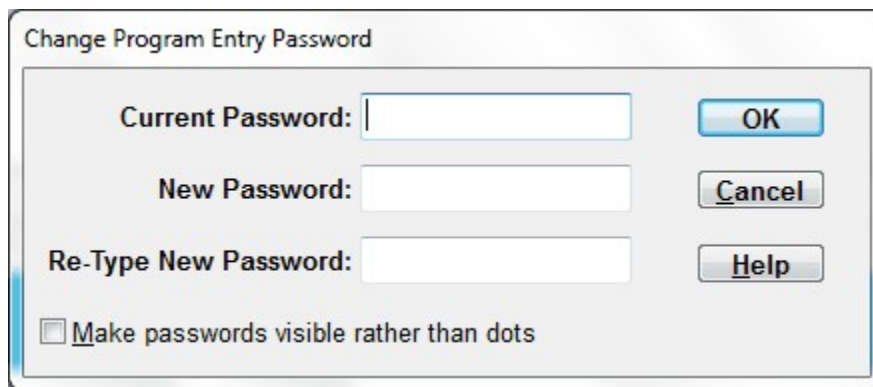
Also of course if you are going to do this, you need to pay for the Local Network Version of DONATION. (However, you **can** test it out during the initial 60-day evaluation period plus grace period, prior to your purchase.)

## 5.6 Passwords in the Program

In the [OnDemand](#) Version of DONATION, users have their own logins and passwords. The following page does not apply to it, except for the **Receipt Password** explained [below](#), which can still be set up. (In the OnDemand version, passwords and permissions are administered in two places - see [OnDemand User Management](#) for details.)

For all other versions of DONATION, the following page explains their password capabilities and options.

You can optionally set up a password for entry to your program by using **Maintenance** ⇒ **Change Password** ⇒ **Program Entry Password**. (If you started by restoring a backup, any passwords that had been previously set up will already be present.) That brings up a window such as the following:



The first time you use this menu option (or any of the password setup windows), you need to leave the Current Password field empty, since there is no Current Password. If you have set up a Program Entry Password, you have to enter it (or one of the other passwords mentioned below, if they are set up) on the password window every time the program starts up. It will be displayed as dots as you type it in. If you want to see it as you type it in, you can check the "Make passwords visible rather than dots" checkbox. If you do specify a password, don't forget it! If you do forget it, [contact us](#) and we will assist you.

### **Other Passwords You Can Set Up**

**Limited User Password:** You can set up a password for program entry for more limited users who cannot see all donor or donation details, with **Maintenance** ⇒ **Change Password** ⇒ **Limited User Password**. For details on the use of this password, see [Using a Limited User Password](#).

**Read Only Password:** You can set up a password for program entry for users who can view data and reports, and create letters etc., but not change any data, generate receipts (other than sample ones) etc. You do that with **Maintenance** ⇒ **Change Password** ⇒ **Read Only Password**. When the program is entered with that password, all menu options, buttons etc. that are allow changing data in the program are either removed or disabled.

**Donors Only Password:** You can set up a password for program entry for users who can view and edit the donor information, but cannot see or change any financial information, including receipts. You do that with **Maintenance ⇒ Change Password ⇒ Donors Only Password**. For details on the use of this password, see [Using a Donors Only Password](#).

When you are changing the Limited User, Read Only or Donors Only passwords, for the Current Password field in the window above, you can either fill in the current password of that specific type, or the current Program Entry password. Either one will allow you to save a change.

**Receipt Password:** You can set up a password for generating receipts with **Maintenance ⇒ Change Password ⇒ Receipt Password**. This can be used to restrict the generation of the receipts to someone that has this password. Entering the program with this password is like entering with the main Program Entry Password, except that when this password has been set up, users who enter with the main Program Entry Password **cannot** create, reprint or delete receipts (except for sample receipts) in the program, unless they subsequently enter it when using a **Receipt** menu option that prompts for it. For users of the [OnDemand Version](#), you cannot enter the program with this password, if it has been set up - you enter it when using a **Receipt** menu option that prompts for it

Of course, all of the above passwords need to be different from each other!

### Internet Backup

**Encryption Password:** Finally, you can change a previously-used password for the encryption of [Internet backups](#) (including those made with the [Cloud Storage service](#)) with **Maintenance ⇒ Change Password ⇒ Internet Backup Encryption Password**. These passwords have to be fairly strong - see [Passwords for Email and Internet Backups](#) for details.

**Email Backup Password:** If you use [email backups](#), another password can be specified to encrypt the database backups you are sending by email, and to decrypt them when you [restore](#) those backups. It is prompted for each time you make such backups, or restore them.

If you set up [multiple databases](#) for multiple organizations, any passwords that you set up are specific to each database.

If you lose or forget a password, please [contact us](#) for assistance. We can help you reset Program Entry or Receipt Passwords, which will then also let you reset Limited User, Read Only or Donors Only passwords. For your security, however, there is no way to recover lost Internet Backup or Email Backup passwords, but you can reset them when you make your next backup.

## 5.7 Using a Limited User Password

Some organizations (in our experience they are all Christian churches) that use envelope numbers also have volunteers who they call Tellers or Counters who collect and tally up the envelopes. Some of those churches also want the Tellers to do the data entry directly into the DONATION program. However, the whole purpose of using envelopes is to increase confidentiality, and thus some users want the Tellers to be able to do data entry based on the envelope number, and not see the donor's name when they do so, or their donation history.

To satisfy these requirements, you can use the Limited User Password in the Standard, legacy Lite, or Local Network Version of the program.

For users of the [OnDemand Version](#), Limited Users are those who have been assigned a login to the current database with the Access Level "Limited".

This Limited User feature is **not** intended to satisfy all possible requirements of other types of organizations, who may want some users to have some privileges, and others to have other privileges. If the exact restrictions in DONATION (explained below) do not satisfy your user security needs, you may need to consider a different program with more such features.

### Setup for Standard or Local Network Versions

You can specify what this password is with the **Maintenance ⇒ Change Password ⇒ Limited User Password** [menu option](#). When you set this, you also must specify a regular logon password (the Program Entry Password) with **Maintenance ⇒ Change Password ⇒ Program Entry Password**. Once you do that, whenever you start the program, you are prompted for that Program Entry password. However, at that prompt either the main Program Entry password or the Limited User Password (assuming you have specified one) is accepted.

A user logging in with the Limited User Password can also change their own password with **Maintenance ⇒ Change Password ⇒ Limited User Password**.

If you have multiple databases, created with the **Database ⇒ Switch Databases** [menu option](#), each database has its own password(s).

### Setup for OnDemand Version

This is done with the **Maintenance ⇒ Administer All Users** menu option by having an Administrator for this database set up a login for one or more Limited users. See [OnDemand Version User Management](#) for details.

### What is Limited?

If you enter the Limited User Password when you start the program, or login to the OnDemand Version with a login that is set to be Limited, the following basic rules and restrictions apply to what you can do. (These restrictions can be altered somewhat by options on the Limited Users tab of **Maintenance ⇒ Main Window Options**, which will be discussed further below.)

- You can see the main window, with envelope numbers listed in the Donor List on the left rather than names.

- You cannot see donors at all who do not have an envelope number (i.e. they do not appear in the Donor List).
- The Donor Details area on the right does not appear, so you cannot see any details such as name, address, phone number, etc. for donors.
- Since you cannot see names, there is no search by name available.
- You cannot add new donors, delete donors, or edit them.
- You can enter new donations in the Donations area at the bottom of the window.
- You cannot edit or delete donations after you have saved them (even the ones you just entered).
- To make the previous point less of a problem, pressing **Enter** doesn't save the donation, as it normally does once you start entering a new donation. You have to click on **Save** or press **F10** to save a donation you are entering.
- You can only see or add donations in the Donations area at the bottom of the window whose Date is greater than or equal to the last Sunday on or before the current day. What this means is that if you are entering Sunday's collection on the same day, you can see the donations you enter right after you enter them. If you wait until later that week to enter Sunday's collection, you can still see them right after you enter them. However, you can't see any donations prior to the current week's Sunday, so you can't see any donor's history of donations. This is done to increase confidentiality, particularly because in many cases donations are done by cheque, so in fact you know the donor name despite these restrictions.
- The previous point implies that the Total shown at the bottom of the Donations area is only for the donations that it shows within that date range since the last Sunday (not all for the year, which is what users using the normal Program Entry password see).
- You can add donations using the **File** ⇒ **One Date Batch Entry** feature. On that screen, the name that is normally visible is removed, and donors with no envelope number are not displayed. Also on that screen, you cannot reset the date that you are doing entries for to any date prior to the current week's Sunday (as above).
- You cannot see or use anything on the **Maintenance, Letters, Receipt, Database** or **Tools** menus.
- On the Reports menu, you can only see and use **Reports** ⇒ **One Date Donation**, which has various options of what it includes. These reports are helpful for double-checking the day's entries. When each of these reports prompts for a date to report on, you cannot go back any further than the current week's Sunday (same restriction as for entry of Donations). You can also see the three **Reports** ⇒ **Category** reports.
- On the **Backup/Restore** menu, you can only use the **Backup Database** menu option.

That is the basic functionality for Limited Users. Obviously, it is quite limited. However, there are several options on the [Limited Users tab](#) of the **Maintenance** ⇒ **Main Window Options** dialog, that allow you (the unlimited user) to progressively increase the capabilities of Limited Users. Since Limited Users cannot even see the Maintenance menu, obviously they cannot change these options themselves. You can only select the three radio button options (about creating new donors) if you selected the checkbox option (about seeing donors who don't have a member/envelope #).

First Checkbox Option: **Can see Donors who don't have a Member/Env. #.** With this option, the following capabilities are added:

- On the Donor List, all donors are shown. For donors with envelope numbers, the envelope number is displayed. For donors without envelope numbers, the name is



displayed. The order is first all those with envelope numbers, in numerical order, followed by those without envelope numbers, in alphabetical order by name.

- You can view (but still not edit) full Donor Details on the right, but only for donors who do not have an envelope number.
- In **File** ⇒ **One Date Batch Entry** of donations, names are shown for donors with no envelope number. (Same as on the Donor List, and in the same sort order.)
- In **Reports** ⇒ **One Date Donation**, names are shown for donors with no envelope number. (Same as on the Donor List, and in the same sort order.)
- Searching by name is allowed, but only for those names without envelope numbers.

Radio Button Options: You select just one of the following three options.

- **Cannot create new Donors:** This is the default option, and this option is forced on if you do not check the checkbox above. Obviously, if this is selected there is no change to the basic limitation that prevents Limited Users from creating new donors.
- **Can create New Donors, but not assign them a Member/Env. #:** In this case you can create new donors, but the Member/Env. # field is disabled so you cannot enter anything into it. It is assumed that the unlimited user would do this later, if desired.
- **Can create New Donors, and also assign them a Member/Env. #:** In this case you can create new donors, and the Member/Env. # field is enabled so you can give new donors an envelope number. However, there is a slightly weird side effect to assigning an envelope number to a new donor. Since Limited Users can't see Donor Details or names for users with envelope numbers, as soon as you finish entering this new donor, the donor's details (and name) will become invisible so you can't see them again. We don't really see any way around this, because otherwise the rules aren't being applied consistently.

We would also note that in the 2nd and 3rd radio button options above, the Limited User still can never edit existing Donors, not even the ones they just added. Limited Users can also never edit existing donations or delete donations (as mentioned above). Thus, if they notice that they have made any errors in their entries, they will have to record those errors and give them to the unlimited user to correct.

We also want to make perfectly clear that no one is obliged to use these Limited User features. There have been no reductions in the capabilities of the program – it is just that, if you wish, you can give the Limited User Password to some volunteers, and they will have limited capabilities.

## 5.8 Using a Donors Only Password

Some organizations may have multiple users of the same DONATION database, where one or more users handle financial information, but one or more other users should only see donor details - not financial information. (The sharing of the database would be by one of the methods in the Help topic [Multiple User Options](#).)

You can set up a password for users who can view and edit the donor information, but cannot see or change any financial information, including receipts. You do that with **Maintenance** ⇒ **Change Password** ⇒ **Donors Only Password**. If a user then enters the program using this Donors Only Password, instead of the usual Program Entry Password, what they can see and do is limited, as explained on this page.

Please see [Passwords in the Program](#) for details on all of the available passwords.

For users of the OnDemand Version, this is instead done with the **Maintenance ⇒ Administer All Users** menu option, by having an Administrator for this database set up a login for one or more Donor Only users. See [OnDemand Version User Management](#) for details.

For users of the OnDemand Version, this is instead done with the **Maintenance ⇒ Administer All Users** menu option, by having an Administrator for this database set up a login for one or more Donor Only users. See [OnDemand Version User Management](#) for details.

#### Limitations of the Donor Only Password

- On the [main window](#), the area for entering and working with donations is removed, so you can only see the Donor List and Donor Details areas.
- In the Donor Details area of the main window, the Annual Pledge or Current Pledge field is never displayed, since it is about money.
- On the **File** menu, the **Edit New Donation** and **One Date Batch Entry** menu options are removed.
- On the **Maintenance menu**, the **Receipt Options**, **Donation Categories**, **Donation Paid By Values**, **Configure Bank Deposits**, **Create Bank Deposit**, and **Count Cash** menu options are removed.
- In the **Maintenance ⇒ Main Window Options window**, only the Donor tab is visible, and the checkbox for whether or not to display the Pledge field is removed.
- In **Maintenance ⇒ Change Password**, the only sub-menu option that is visible is **Donors Only Password**.
- All of the **Letters** menu options are available, but in the [One Letter](#) and [Mass Mailings](#) options, the only option in section 1 of those windows (for the type of letter) is Donor Information Only. Plus, the donor fields Pledge, Total Amount, Outstanding Amount and Last Year Amount are not available. Those amount fields are also not available for filtering when you use the **Email Donors menu option**.
- In the **Reports** menu, the **Donor ⇒ Donation Info**, **Donation**, **One Date Donation**, **Bank Deposit**, **Pledge**, **Receipt** and **Fiscal Year** menu options and sub-menus are not available.
- In the **Reports ⇒ Donor** sub-menu, the **Donor Category 1 Totals**, **Donor Category 2 Totals**, **Old Donors**, **Non Donors** and **Charity Donors** menu options are not available.
- In the **Reports ⇒ Category** sub-menu, the **Donation** and **Accounting Accounts** menu options are not available.
- A number of reports under **Reports ⇒ Donor** have invisible total\_amount fields (the donor's total donations in the current year) that can be [Filtered](#) on and [exported](#). Those fields are still there, but their values will always be \$0 for every donor when using this password, so they do not tell you anything.
- The [Report Browser](#) shows only the same reports as are available on the main **Reports** menu sub-menus.
- [Reports Scripts](#) only allow you to run reports that you could run directly through the menus or the Report Browser, as indicated above.
- Some reports (like mailing labels) that have options for only selecting donors with donations within a given range of dates have that option disabled.
- [Custom Reports](#) only allow you to select Donor fields - no Donation, Receipt or Pledge fields.



- You can [memorize](#) reports, but in **Reports** ⇒ **Memorized Reports** you can only re-run reports that were memorized when you (or someone) had entered the program with the Donors Only password.
- The **Receipts** menu is removed.
- The only option on the **Database** ⇒ **Import** [sub-menu](#) is **Donors**. Also on the **Database** menu, **Change Date of Donations**, **Delete Old Data**, **Delete All Data**, and **Delete Latest Year** are all removed.
- In **Database** ⇒ [SQL Select](#), you cannot run SQL that references any database tables or columns that include financial information, such as pledges, donations, receipts, bank deposits and cash counts.
- You cannot see or edit [Communications](#) information, since it would usually be relevant to donations or receipts.

## 5.9 Converting Data from The Church Assistant

DONATION can convert and import much of your data from the program The Church Assistant from WinCrafters, which has not been supported since October 2011, and does not work on 64-bit computers.

If you are using the [Local Network Version](#) of DONATION, the conversion can only be done from the Local Network Server Version - it cannot be used from the Local Network Client Version.

If you are using The Church Assistant, the first time you run DONATION, it will prompt you with a message box, asking whether to convert and import your data. If you answer Yes to that message box, it will automatically transfer much of your data from The Church Assistant into the DONATION database. You can see the progress of the conversion in a window that will be displayed on the screen. (Your existing Church Assistant data will be unchanged.)

If you answer No the conversion message box, it will just [start you up](#) with an empty DONATION database normally, and prompt you to enter your Organization Info and Categories just as it would if you did not have The Church Assistant. You can transfer your data later using the **Database** ⇒ **Import** ⇒ **From Church Assistant** menu option. If you answer Cancel to the conversion message box, the program will exit.

The conversion of data from The Church Assistant completely replaces any data that you already had in your DONATION database.

**Note:** Importing and converting your data from Church Assistant does not affect your existing Church Assistant data in any way - you will still be able to run Church Assistant after this (if you were able to run it before!).

If you want to try the conversion once, then continue using The Church Assistant for a while, and convert again later when you are ready to really switch to using DONATION, you can also do that with the **Database** ⇒ **Import** ⇒ **From Church Assistant** menu option. Using that option again completely replaces what is in your DONATION database (including any new entries you have made in it) with the converted data.

If you are converting from another program, see [this section](#) instead.

### What gets Converted

Because DONATION's data structures do not exactly match The Church Assistant's data structures, not everything can be imported. Here is what happens:

- Families are imported to become Donors. (Certain little-used fields that do not match fields in DONATION are omitted though, in particular the Second Spouse's Family Name, the Second Phone, and the Moved checkbox. If both a P.O. Box # and a House # and Street are present, only the P.O. Box # is imported.)
- Donations are imported, though only for the current year.
- Donation categories are imported.
- Your Personalize data (church name and address) are imported into the Organization Info. (Church Area Code is not imported.) Your three User Field names, if used, are imported as DONATION's first three Other Info field names.
- Individual Family Member data is not imported - there is no distinct concept of "families" in DONATION, as opposed to donors.
- Sunday Service, Other Ministry and Church Officers/Committees are not imported.
- A program entry password is not set - you can set it with the **Maintenance ⇒ Change Password ⇒ Program Entry Password** menu option.

There are various problems of mismatched data or errors in The Church Assistant's data that can come up during the conversion. You will be notified of the most significant such issues with message boxes, and in some cases, asked whether or not DONATION should automatically fix the problems for you. Please read these messages carefully, and take note of what they tell you, in case they will require later manual fixing. In the case of any questions you are asked about automatically fixing problems, it is probably best to answer Yes, to let them be fixed automatically.

#### Differences from and Improvements over The Church Assistant

- Re-installing the original program does not wipe out your data files.
- Much of your work is done on a main window that shows the list of all donors (called "families" in Church Assistant), the selected donor's details, and all of that donor's donations. There's also a quick [batch entry](#) window for your Sunday collection.
- There is much more flexibility about [receipt formatting](#), including an option to add your own wording and otherwise change the format.
- Both [split receipting](#) (donations with what the CRA calls an "advantage") and [gifts in kind](#) are properly handled.
- You can issue [duplicate or corrected receipts](#), marked as such.
- You can go back to the [previous year's data](#) to make changes, including correcting errors in receipts, after you have done the year-end procedures, without using backup and restore.
- As many years of data as you wish can be stored in the same database.
- There is an optional [limited user password](#), for use by counters or tellers who should be allowed to enter the collection, but not see donor's names.
- Envelope numbers are optional.
- There is a utility for automatically [renumbering](#) all envelope numbers, or you can renumber individual ones.
- Categories are not numbered.
- There are two optional user-definable lists of [Donor Categories](#) that you can use, if you wish to categorize your donors in some way.
- Both donors and donations can be marked as "[non-receiptable](#)", so they won't receive a charitable receipt.

- There is strong support for [mail merge letters](#), with an internal editor – no need to use your word processor.
- Receipts and statements can be [emailed](#) to those donors with email addresses.
- Database backups can be easily [emailed](#), for example to share the data with another user in your church who has installed DONATION. (And there is no extra charge for that.)
- Various levels of [pledging](#) data entry are supported, including multi-year pledges.
- As well as over 30 built-in [reports](#), you can create [custom reports](#).
- A multi-user [Local Network](#) version is available.
- Reports that depend on family member information, such as a church directory, are not included in DONATION.
- There is much more protection against invalid data entry.

## 5.10 Converting Data from Membership Plus

DONATION can convert and import much of your data from the Membership Plus program, which many users seem to be switching from.

If you are using the [Local Network Version](#) of DONATION, the conversion can only be done from the Local Network Server Version - it cannot be used from the Local Network Client Version.

Currently DONATION can convert from 4, 5, 6, 7, 8, 9, 10 (Membership Plus 2007), 11 and 12 of Membership Plus. If you have a different version and want to have your data converted, you will need to send a copy of your Membership Plus database files to [Software4Nonprofits](#) for analysis, in order to have the program enhanced to convert that version's data as well.

If you only want to import donor information from Membership Plus (any version), you can see [this section](#) instead.

The information that can be converted from your Membership Plus database is your organization information, donation categories (funds), donors (members) and donations (contributions) for all years of data that it contains.

If you are using Membership Plus, and its data is located in the standard Membership Plus data directory, then the first time you run DONATION, it will prompt you with a message box, asking whether to convert and import your data. If you answer Yes to that message box, it will automatically transfer much of your data from Membership Plus into the DONATION database. You can see the progress of the conversion in a window that will be displayed on the screen.

If you answer No the conversion message box, it will just [start you up](#) with an empty DONATION database normally, and prompt you to enter your Organization Info and Categories just as it would if you did not have Membership Plus. You can transfer your data later using the **Database ⇒ Import ⇒ From Membership Plus** menu option. If you answer Cancel to the conversion message box, the program will exit.

If you use the **Database ⇒ Import ⇒ From Membership Plus** menu option, you will be prompted to select the directory where your Membership Plus database files are located. From there, just follow the prompts to have your Membership Plus data imported into DONATION.

A number of files are imported, starting with importing the organization name etc. from ORGDATA.DBF (for versions of Membership Plus through version 7) or ORGDATA.DAT (for Membership Plus version 8 or higher). If one of those files is not found in the folder you are trying to import from, it does not contain Membership Plus data and this will not work.

If all you have is a Membership Plus backup file (which could be called MPLUSWIN.ZIP in older versions of Membership Plus, or something like MPBackup\_(date)\_(time).ZIP in newer versions) you will have to extract the files from that compressed Zip file. That can be done through Windows Explorer, Computer or My Computer by right-clicking on the file and picking Open, then in the window that comes up, choosing to Extract all files. Once you have extracted the files, you will be able to restart this menu option and use the directory the files were extracted to for the conversion.

The full list of files that are read as part of the conversion for versions of Membership Plus through version 7 are: ADDRESS.DBF, CCURSPLT.DBF, CFNDSPLT.DBF, CONTRIB.DBF, FUNDS.DBF, MEMBERS.DBF, and ORGDATA.DBF. (For version 4, the file names are slightly different: ADDRESS.DBF, CONTRIB.DBF, CURSPLIT.DBF, FNDSPILT.DBF, FUNDS.DBF, MEMBERS.DBF and ORGDATA.DB.)

For Membership Plus version 8 or higher, the required files for the conversion are roughly the same ones, with ".DAT" extensions instead, specifically: ADDRESS.DAT, CCURSPLT.DAT, CFNDSPLT.DAT, CONTRIB.DAT, FUNDS.DAT, FUNDS.BLB, MEMBERS.DAT, and ORGDATA.DAT. (Note that this second list has one extra file - FUNDS.BLB.)

For Membership Plus 8 or higher, particularly if you are doing this on a computer that doesn't have Membership Plus installed on it (only a copy of the database files) you may be prompted to download and run a ODBC driver installation file called donationDbisam.exe, which is needed for the program to be able to read the data out of the Membership Plus database files. Just follow the prompts to do so.

The conversion of data from Membership Plus completely replaces any data that you already had in your DONATION database.

**Note:** Importing and converting your data from Membership Plus does not affect your existing Membership Plus data in any way - you will still be able to run Membership Plus after this (if you were able to run it before!).

If you are converting from another program, see [this section](#) instead.

Some specific notes on the conversion:

- You are given an option to skip importing any donors that do not have any donations.
- Member records for families (as opposed to individuals) are only imported as donors if they have donations. (DONATION has no notion of families, only individuals.) The family name for families that are being imported is split into a First Name and Last Name field, at an appropriate space, after you specify, on the first such name found, whether the name is in the format "First Last" or "Last First". (Both formats have been seen in actual data sets being converted, as well as things like "The Smith Family", which unfortunately will get split up in an inappropriate way.)
- Deleted donors and donors marked as deceased are only imported if they have donations. Any such imported donor records will have "DELETED" added in the Business Name field for easy identification on the Donor List.

- When organizations are imported, if there is a contact name, it is split up and saved as the First Name and Last Name. (The organization name is saved as the Business Name.)
- If you have multiple years of donations in Membership Plus, in years prior to the latest year, only donors that have donations are saved, to avoid filling up the database unnecessarily. If for any reason you want to restore all donors that are in the latest year to an earlier year, you can use the **Database** ⇒ **Copy Missing Donors** [menu option](#).
- Funds marked as not being Active are not imported as donation categories, unless there are contributions associated with them. (In Membership Plus 4, you cannot mark funds as inactive, so all funds are imported.)
- At least some versions of Membership Plus allow funds to be created with no names (which seems like a bug!). In DONATION, they need names. Such funds are given names like "Fund Number 24" in the conversion, based on a unique internal fund number in Membership Plus, which is not displayed to the users. These funds are only imported if there are donations that use them.
- Some Membership Plus fields are longer than the corresponding fields in DONATION. If necessary, field contents will be truncated (cut down) to the maximum size in DONATION. If this happens, you will be shown a file of all such fixes after the conversion is completed, which you can print out and use to fix any problems caused by this truncation.

## 5.11 Converting Data from GiftWorks

DONATION can convert and import much of your data from the GiftWorks program, by reading it either from an actual GiftWorks database file or a GiftWorks database backup file. Some users seem to be switching from due to their takeover by another company followed by significant price increases in 2013. GiftWorks is of course a much larger program than DONATION, so DONATION can only import the data that it normally stores!

If you are using the [Local Network Version](#) of DONATION, the conversion can only be done from the Local Network Server Version - it cannot be done from the Local Network Client Version.

If you try the conversion and have difficulties, please contact us at [Software4Nonprofits](#) for assistance. We may ask you to send us a copy of your GiftWorks database file for analysis, in order to have the program enhanced to convert that version's data as well.

The information that can be converted from your GiftWorks database is your organization's name and address, donation categories (funds), donor categories (donor types), donors and donations (gifts). All years of donations are imported.

To start the conversion, use the **Database** ⇒ **Import** ⇒ **From GiftWorks** menu option. You will be prompted to select the GiftWorks database file or backup file to be converted. The file open dialog box comes up initially in a folder where we have been informed these files are generally found, but that may or may not be correct on your computer. The GiftWorks database file will be a filename ending in ".gds", or you can use a GiftWorks backup file, which is a filename ending in ".gbf". From there, just follow the prompts to have your GiftWorks data imported into DONATION.

**Note:** If you use a GiftWorks backup file, it ends up extracting the actual database file from that, and storing it in DONATION's [data directory](#). If you look at that extracted file in the Computer or Windows Explorer tools, it may have an unexpected modification date. (One backup that we tested with a 2014 date extracted a database that it showed as having a 2004

date, but it really did include 2014 data!) This incorrect date appears to be a bug in the GiftWorks backup routine, but is not a real problem.

The conversion of data from GiftWorks completely replaces any data that you already had in your DONATION database.

**Note:** Importing and converting your data from GiftWorks does not affect your existing GiftWorks data in any way - you will still be able to run GiftWorks after this (assuming you were able to run it before!).

Some specific notes on the conversion:

- DONATION keeps separate copies of donor records for each calendar year of data in the program. All donor records that are not deleted will be imported into the latest year (the one with the latest donation from GiftWorks). For prior years, only donor records that have donations will be imported. If for some reason you want the donors to be the same in all years, you can use the [Copy Missing Donors](#) function in DONATION.
- The same approach is taken with donation categories (which we believe are called funds in GiftWorks) - all of them are imported into the latest year, but only ones actually used in donations are imported into prior years.
- We have seen cases where there seem to be duplicate records for donors, one with a first and last name in GiftWorks, and one with only a display name, but no first or last name. We're not clear why this happens, but the same duplication will then occur in DONATION. DONATION does not have a display name field, so it will try to split such names up into first and last names.
- Deleted donors are only imported into a given year if they have donations in that year. Any such imported donor records will have "DELETED" added in the Business Name field for easy identification on the Donor List.
- Donor types, if you used them, are imported into the Donor Category 1 field in DONATION, but only in the latest year of donors and donations.
- Some GiftWorks fields are longer than the corresponding fields in DONATION. If necessary, field contents will be truncated (cut down) to the maximum size in DONATION. If this happens, you will be shown a file of all such fixes after the conversion is completed, which you can print out and use to fix any problems caused by this truncation. For technical reasons, there may be some duplications in this list of fixes, for example donor names or donation categories that were cut down once for each year they were imported into. There is probably no good reason to do any fixes in anything other than the latest year.

## 5.12 Converting Data from Roll Call

DONATION can convert and import much of your data from the ByTheBook Roll Call program, by reading data dumped from the program.

Roll Call has been purchased by ACS Technologies, and is being discontinued in September 2021, with the intention that users will switch to the ACST Realm program. While that is an excellent option, some users may prefer a smaller and significantly less expensive option, in which case converting to DONATION may meet their needs.

If you are using the [Local Network Version](#) of DONATION, the conversion can only be done from the Local Network Server Version - it cannot be done from the Local Network Client Version.



Our development of this converter was done with the most recent version of Roll Call, 15.5.7. It is possible that earlier versions may have differences in their database structure which will mean that the conversion will not work. If you try the conversion and have difficulties, please contact us at [Software4Nonprofits](http://Software4Nonprofits.com) for assistance. We may ask you to send us a copy of your dumped Roll Call data files for analysis, in order to have the program enhanced to convert that version's data as well.

The information that can be converted from your Roll Call database is your donors (people), donations, donation categories (funds), and donor categories (the Association and Family Position lists). All years of donations are imported. If you have a global email sending configuration in Roll Call, that will also be imported. Not all fields from all types of data are imported, because DONATION tracks fewer things than Roll Call, but the core information you need should be there.

Before you can do the conversion, you need to dump the data from Roll Call, because DONATION cannot read data directly from the Roll Call database. Do that as follows:

- From the Roll Call main menu, choose **Administration** ⇒ **User Procedure**.
- In the window that comes up, enter exactly "data\_dump", without the quotes, in the big entry box, then click **Execute**.
- Answer **OK** to the prompt saying that it will export to the data dump folder.
- **Important:** Answer **Yes** to the question "Would you like to export headers?".

These are the steps for the current release of Roll Call. It's possible that they may be slightly different in earlier releases.

If you start DONATION with an empty database, and it can detect that you have Roll Call installed, you will be prompted to do the conversion. Otherwise, if you have already initialized your DONATION database, or if you wish to re-import a new data dump from Roll Call, you can do it with the **Database** ⇒ **Import** ⇒ **From Roll Call** menu option.

The conversion of data from Roll Call completely replaces any data that you already had in your DONATION database, except for your Organization Info, which Roll Call does not dump, so it cannot be imported.

**Note:** Importing and converting your data from Roll Call does not affect your existing Roll Call data in any way - you will still be able to run Roll Call after this (assuming you were able to run it before!).

Some specific notes on the conversion:

- DONATION keeps separate copies of donor records for each calendar year of data in the program. All donor records will be imported into the latest year (the one with the latest donation from Roll Call). For prior years, only donor records that have donations will be imported. If for some reason you want the donors to be the same in all years, you can use the [Copy Missing Donors](#) function in DONATION.
- The same approach is taken with donation categories (which are called funds in Roll Call) - all of them are imported into the latest year, but only ones actually used in donations are imported into prior years.
- DONATION does not have a specific notion of families. All people are imported as individual donors.

- DONATION has two renameable drop-down lists for donors called Donor Category 1 and 2. Those are filled in with the Association list and Family Position list from Roll Call.
- DONATION has 6 renameable Other Info fields for donors. The first five of those are used to import an internal code from Roll Call called the Family Code (which is consistent across all people in one family), the Spouse First Name, Gender, Marital Status and Birth Date, which seemed to us to be the most important fields in Roll Call that DONATION did not have standard fields for.
- DONATION only stores one phone number for donors. If the person has a cell number, that will be used. If not, if they have a work number, that will be used. And if not, the family phone number will be used.
- DONATION only stores one email address for donors. If the person has a personal email address, that will be used. If not, any family email address will be used.
- Any Suffix on names is not imported. The Title, First Name, Middle Name, and Last Name are imported.
- Names with only a Last Name and no First Name are assumed to be organizations or businesses, so that name is imported into DONATION's Business Name field.
- DONATION has an equivalent concept to QuidProQuo amounts in donations in Roll Call (see [Donations and Receipts with Advantage](#)). Unfortunately, the way that is stored in the Roll Call data is not always convertible to the way that is stored in the DONATION database, so QuidProQuo amounts may not be imported. (The donations including them are still imported!) If there are QuidProQuo amounts that aren't imported, you will get a detailed message explaining that, and telling you what you need to do.
- DONATION records exactly which donations are included in which numbered tax receipts, so that donations added after a receipt has already been issued will go onto a new separate receipt. Roll Call does not do that - it only records that a certain receipt number was given to a certain person. So it is not possible to import and convert that receipt information.
- Some Roll Call fields are longer than the corresponding fields in DONATION. If necessary, field contents will be truncated (cut down) to the maximum size in DONATION. If this happens, you will be shown a file of all such fixes after the conversion is completed, which you can print out and use to fix any problems caused by this truncation. For technical reasons, there may be some duplications in this list of fixes, for example donor names or donation categories that were cut down once for each year they were imported into. There is probably no good reason to do any fixes in anything other than the latest year.

## 5.13 Converting Data from PowerChurch Plus

DONATION can convert and import much of your data from the PowerChurch Plus program, by reading data directly from its database files.

The reason we made this available is that some users may prefer a smaller and significantly less expensive program than PowerChurch Plus, in which case converting to DONATION may meet their needs.

Some benefits of DONATION for Canadian users are its specific handling of the various Canada Revenue Agency (CRA) requirements for receipts, including:

- [Split receipting](#) (donations with advantage)
- [Gifts in Kind](#)
- [Duplicate and corrected](#) receipts, giving them new receipt numbers and showing which receipt number they replace or correct. That ensures that the same donation cannot be



accidentally included on two different receipts without the previous receipt being re-issued with an indication that it has been cancelled and replaced by the new one.

If you are using the [Local Network Version](#) of DONATION, the conversion can only be done from the Local Network Server Version - it cannot be done from the Local Network Client Version.

Our development of this converter was done with the most recent version of PowerChurch Plus, version 12.0, and it was also tested with data from version 11.0. It is possible that earlier versions may have differences in their database structure which will mean that the conversion will not work. If you try the conversion and have difficulties, please contact us at [Software4Nonprofits](#) for assistance. We may ask you to send us a copy of your PowerChurch Plus data files for analysis, in order to have the program enhanced to convert that version's data as well. Of course, we would keep your data entirely confidential if you sent it to us - it would only be used to help us analyze and fix the problem.

The information that can be converted from your PowerChurch Plus database is your donors (people within families), donations, donation categories (funds), and donor categories (the Personal Status and Marital Status lists). All years of donations are imported. Not all fields from all types of data are imported, because DONATION tracks fewer things than PowerChurch Plus, but the core information you need should be there.

PowerChurch Plus also include fund accounting, like our ACCOUNTS program. Unfortunately, the structure of its chart of accounts and funds is significantly different from the structure in ACCOUNTS, and thus that information cannot be converted.

If you start DONATION with an empty database, and it can detect that you have PowerChurch Plus installed, you will be prompted to do the conversion. Otherwise, if you have already initialized your DONATION database, or if you wish to re-import a new data dump from PowerChurch Plus, you can do it with the **Database ⇒ Import ⇒ From PowerChurch Plus** menu option. That will search for a standard directory to find your data files in, and if it can't do that, prompt you to specify that directory.

The conversion of data from PowerChurch Plus completely replaces any data that you already had in your DONATION database.

**Note:** Importing and converting your data from PowerChurch Plus does not affect your existing PowerChurch Plus data in any way - you will still be able to run PowerChurch Plus after this (assuming you were able to run it before!).

**Technical Note:** The PowerChurch Plus data files that the conversion actually reads from are CO.DBF, COCODES.DBF, COFUND.DBF, COINFO.DBF, COINFO.FPT, COTRANS.DBF, MA.DBF, MA.FPT, ME.DBF, ME.FPT, MECODES.DBF, PCINFO.DBF and PCINFO.FPT. (Some of those files may or may not be present, or needed, depending on your version of PowerChurch Plus.)

Some specific details about the conversion:

- DONATION keeps separate copies of donor records for each calendar year of data in the program. All donor records will be imported into the latest year (the one with the latest donation from PowerChurch Plus). For prior years, only donor records that have donations

will be imported. If for some reason you want the donors to be the same in all years, you can use the [Copy Missing Donors](#) function in DONATION.

- The same approach is taken with donation categories (which are called funds in PowerChurch Plus) - all of them are imported into the latest year, but only ones actually used in donations are imported into prior years.
- DONATION does not have a specific notion of families. All people are imported as individual donors. When multiple people within a family have the same Envelope #, that number is only associated with the first person in the family with that number in DONATION, because there cannot be two donors with the same Envelope # in DONATION.
- DONATION has two renameable drop-down lists for donors called Donor Category 1 and 2. Those are filled in with the Personal Status list (Member etc.) and Marital Status list (Married etc.) from PowerChurch Plus.
- DONATION only stores one phone number for donors. A personal phone number from PowerChurch Plus is used if the person has one, and the family phone number is used otherwise. If the person or family has more than one phone number, the first one will be used.
- DONATION only stores one email address for donors. A personal email address from PowerChurch Plus is used if the person has one, and the family email address is used otherwise. If the person or family has more than one email address, the first one will be used.
- There is no option to determine which donors with email addresses receive emailed tax receipts. If you choose to email receipts, all displayed receipts for donors with email addresses will receive them that way.
- Any Suffix on names is not imported. The Title, First Name, Middle Name, and Last Name are imported.
- Names with only a Last Name and no First Name are assumed to be organizations or businesses, so that name is imported into DONATION's Business Name field.
- If there are unposted contributions, you are given an option of importing them along with the posted contributions.
- Repeating contribution definitions are not imported.
- DONATION records exactly which donations are included in which numbered tax receipts, so that donations added after a receipt has already been issued will go onto a new separate receipt, and the same donations will never be included in two different receipts (unless a subsequent one is marked as a Replacement or Correction). PowerChurch Plus does not do that - it only records that a certain receipt number was given to a certain person, for donations within a certain range of dates. (And it only records that at all for Canadian users.) So it is not possible to import and convert that receipt information, because it doesn't sufficiently clarify which donations were included in each receipt, and can include the same donations on multiple receipts.
- Some PowerChurch Plus fields are longer than the corresponding fields in DONATION. If necessary, field contents will be truncated (cut down) to the maximum size in DONATION. If this happens, you will be shown a file of all such fixes after the conversion is completed, which you can print out and use to fix any problems caused by this truncation. For technical reasons, there may be some duplications in this list of fixes, for example donor names or donation categories that were cut down once for each year they were imported into. There is probably no good reason to do any fixes in anything other than the latest year.

## 5.14 Converting Data from Geminon

Geminon church software is a program that is no longer available - the authors of it seem to have completely disappeared. DONATION can convert and import much of your data from the Geminon program, by reading it from an actual Geminon database file. Geminon stores some data that DONATION does not, so only data that is normally stored in the standard fields in DONATION is converted.

If you are using the [Local Network Version](#) of DONATION, the conversion can only be done from the Local Network Server Version - it cannot be done from the Local Network Client Version.

As of April 2015, this conversion feature is still fairly new, and we are not entirely sure which versions of Geminon it works with (if there were multiple versions) or whether there might be peculiarities of the data that cause problems for the conversion. If you try the conversion and have difficulties, please contact us at [Software4Nonprofits](#) for assistance. We may ask you to send us a copy of your Geminon database file for analysis, in order to have the program enhanced to convert that version's data as well.

The information that can be converted from your Geminon database is your organization's name and address, donation categories (what Geminon calls Offering Types), donors (what Geminon calls Members) and donations (what Geminon calls Offerings). All years of donations that are in the current data are imported, but data that has been archived in Geminon is not imported.

To start the conversion, use the **Database = Import = From Geminon** menu option. You will be prompted to select the Geminon database file to be converted. If the program cannot find a unique database file in the expected location, a file open dialog box comes up to select the file, initially in a folder where we think these files are generally found, but that may or may not be correct on your computer. The Geminon database file will be a filename ending in ".mdb". From there, just follow the prompts to have your Geminon data imported into DONATION.

On an initial startup of DONATION with an empty database, if it detects a Geminon database in the standard location for it, you will also be prompted about whether to convert the data. If you answer No then, you can convert it later with the menu option mentioned above.

The conversion of data from Geminon completely replaces any data that you already had in your DONATION database.

**Note:** Importing and converting your data from Geminon does not affect your existing Geminon data in any way - you will still be able to run Geminon after this (assuming you were able to run it before!).

Some specific notes on the conversion:

- DONATION keeps separate copies of donor records for each calendar year of data in the program. All donor/member records will be imported into the latest year (the one with the latest donation from Geminon). For prior years, only donor records that have donations will be imported. If for some reason you want the donors to be the same in all years, you can use the [Copy Missing Donors](#) function in DONATION.

- The same approach is taken with donation categories (called Offering Types in Geminon) - all of them are imported into the latest year, but only ones actually used in donations are imported into prior years.
- DONATION does not have a concept of families with family members. Any family members you specified in Geminon will have their basic details added to the Comments field for the donor record created in DONATION from the basic Member record for the family in Geminon.
- The Notes field for Members in Geminon is also copied into the Comments field in DONATION, preceding any family information, but only if no fonts, boldface etc. were used in Geminon, because that converts the Note to RTF (rich text format) which cannot easily be converted back to plain text for the Comments field.
- Some Geminon fields are longer than the corresponding fields in DONATION. If necessary, field contents will be truncated (cut down) to the maximum size in DONATION. If this happens, you will be shown a file of all such fixes after the conversion is completed, which you can print out and use to fix any problems caused by this truncation. For technical reasons, there may be some duplications in this list of fixes, for example donor names or donation categories that were cut down once for each year they were imported into. There is probably no good reason to do any fixes in anything other than the latest year.
- DONATION only has one phone number field, whereas Geminon has both Home Phone and Bus/Fax Phone fields. If there is a Home Phone, it will be used, and if not, if there is a Bus/Fax Phone, it will be used. If there is space after the phone number (which there usually will be, unless there's an extension), "(h)" will be added as an identifier after home phone numbers, and "(b/f)" as an identifier after business/fax numbers.
- Geminon has no special facility for business names, whereas DONATION has a Business Name field. Since there is no way to identify business names during the conversion, if you have any, you will want to move them from however they were split up in the First Name and Last Name fields into the Business Name field.
- It is possible for there to be unposted offerings (donations) in Geminon. If that is detected, you will be prompted with options as to what to do about that, including going back into Geminon to post them, or just importing them, or skipping them.
- Negative dollar amount corrections in Geminon seemed to be put into envelope number 9998, in a Member named "zz Account, Over Under". You shouldn't need a donor like that in DONATION (though if you want to get rid of it, you would first have to figure out what to do with any donations that were credited to it that were converted).

## 5.15 Converting Data from Other Programs

Some organizations may have been using other programs to track their donations, such as general-purpose database programs, commercial donations programs, or spreadsheets like Excel. DONATION currently has a number of different features available for importing existing data from other programs.

These ones are for general importing from data exported from any other program or source of data:

- [Importing Donors from Excel, Text or CSV Files](#) imports only Donor information from Excel or variously formatted text files, and is the easiest and most flexible option to use. Most users who choose to do importing, if they aren't converting from one of the programs listed below, use this option. This can also automatically import Donor Categories.
- [Importing Donations or Recurring Donations](#) imports Donation information and Donation Categories from Excel or specially formatted text files.

- [Importing Donors and Donations from One File](#) explains how to do that if the donor and donation information are both on the same rows of a single file.
- [Importing Donors and Donations from QuickBooks](#) are instructions for if you have been recording that information in QuickBooks, and have switched from that to DONATION for recording those details.
- [Importing PAR Donations](#) imports a file of donations from the United Church of Canada's automatic monthly donation withdrawal program, called PAR.
- [Importing all Data from Other Programs](#) can import Organization Info, Donors, Donations, Donation Categories and Receipts from specially formatted text files, but is quite complex to use. This is only recommended for users who are very comfortable and quite skilled with computers, and for whom the other options on this page are not sufficient.

These ones are for importing from or automatically converting from some other specific programs:

- [Converting Data from Membership Plus](#) imports Organization Info, Donors, Donations (for the last two working years) and Donation Categories from all known current Windows versions of the Membership Plus program.
- [Converting Data from GiftWorks](#) imports Organization Info, Donation Categories (what GiftWorks calls funds), Donor Categories (what GiftWorks calls donor types), Donors and Donations (what GiftWorks calls gifts).
- [Converting data from PowerChurch Plus](#) imports Organization Info, Donation Categories (what PowerChurch calls funds), Donor Categories (Personal Status and Marital Status), Donors (as individuals, not families) and Donations (what PowerChurch calls contributions).
- [Converting Data from Roll Call](#) imports Donation Categories (what Roll Call calls Funds), Donor Categories (the Association and Family Position options for donors), Donors and Donations.
- [Importing Data from Viansoft Church Contribution System](#) imports Donors, and optionally also Donations and Donation Categories, exported from that program. However, that program needs to be working, for you to manually export that data from it - it is not possible for DONATION to directly read the data from that program's database files.
- [Converting Data from Geminon](#) imports Organization Info, Donation Categories (what Geminon calls offering types), Donors (what Geminon calls members) and Donations (what Geminon calls offerings).
- [Converting Data from Church Assistant](#) imports Organization Info, Donors, Donations (for the current working year) and Donation Categories from the WinCrafters Church Assistant program.

Some users who are converting from another program either will not choose to import the data from it, or will not be able to. In that case, to avoid too much re-typing of data, you would be advised to start using DONATION as close to the beginning of a new year as possible.

## 5.16 Importing Donors from Excel, Text or CSV Files

It is possible to import donors from Excel, text or CSV files into DONATION using the **Database ⇒ Import ⇒ Donors** menu option. Most commonly that would be data exported from other programs.

There are special menu options for importing data from certain other programs, which should be used instead of this feature if you are switching from one of those programs. See the following topics if they apply:

- [Converting Data from Membership Plus](#) (See also [below](#) for further details.)
- [Converting Data from GiftWorks](#)
- [Converting Data from PowerChurch Plus](#)
- [Converting Data from Roll Call](#)
- [Converting Data from The Church Assistant](#)
- [Importing Data from Viansoft Church Contribution System](#)
- [Converting Data from Geminon](#)

With the **Database** ⇒ **Import** ⇒ **Donors** option, you can import Excel files, tab-separated text files, or comma-separated value (CSV) files. They can contain any combination of the fields in DONATION's Donor table, in any order. The only fields that must be filled in are a field or fields for the donor's name, and for Canadian users, Addr1.

If your file to be imported contains both donor and donation information on the same line, it will probably be preferable to use the **Database** ⇒ **Import** ⇒ **Donors and Donations** [menu option](#), which does all of the importing in one step. For this to work, each line would also have to contain a field that you can use as a unique identifier (also called unique ID) matching a field that you will import into DONATION, which will be either the Member/Envelope # field, or the Email Address.

If you select an Excel file to import, DONATION will have Excel invisibly save it to a comma-separated value (CSV) file (described below), and then actually import that CSV file.

A tab-separated text file is a plain-text file where each donor is on its own line, and each field on the line (even optional fields that have no data for the current donor) is separated by one tab character. Fields may optionally be enclosed in quotation marks, but that is not necessary. The file may optionally have one or two rows of column headers at the top. If you currently have the data in a spreadsheet program such as Excel, you can easily export it to tab-separated text with the **File** ⇒ **Save As** menu option, using the Save as type "Text (Tab Delimited)" or "Unicode Text" if your data might include accented characters, or characters that are not part of the English alphabet.

A comma-separated value (CSV) file is somewhat similar to a tab-separated text file, but a comma rather than a tab separates the fields on each line, and fields containing commas (or double quotes) are enclosed in double quotes. If you currently have the data in a spreadsheet program such as Excel, you can easily export it to CSV with the **File** ⇒ **Save As** menu option, using the Save as type "CSV (comma delimited)" or "CSV UTF8 (comma delimited)" if your data might include accented characters, or characters that are not part of the English alphabet. If you specify to import an Excel file, DONATION will actually do that save to CSV for you, and then import the CSV file.

Other spreadsheet programs (like OpenOffice Calc) may only have options to save files as CSV - that works too, although you will have to do that saving manually. DONATION cannot do that conversion for you if you do not have Excel installed.

**Note:** Within this Help topic (and in messages from the program when using this option) the words "row" and "line" will be used interchangeably to refer to lines in the input file.

This procedure can replace or update any existing donors, or even ignore rows matching existing donors, depending on the options you choose. The updating or ignoring is based on



your selected unique ID, which can be either the Member/Envelope Number or Email Address, matching lines in the input file to that field in the existing donors.

All existing donors will always stay there when you use this procedure. In fact, you can end up with two copies of each donor if you import the same file twice by accident, and either you have selected to Add all rows, or a row being imported doesn't have your selected unique ID field filled in, that allows the program to notice the duplication! This process will never allow adding duplicate Member/Envelope Numbers. It will also warn you if there are names matching existing donors, that might create duplicates.

The importing only affects the current year's donor list. (To understand about the fact that each year's donor list is distinct, please see [Changing Years in the Database.](#))

When you select **Database ⇒ Import ⇒ Donors**, the following window comes up:

Import 2020 Donors (Default settings) X

1. Select the fields of donor information from the list at the left, and insert them into the list at the right in the order they are present in your import file.

<p><b>Donor Fields:</b></p> <div style="border: 1px solid gray; padding: 5px;">         Addr2 (Merge 2 Fields)          Addr3 (Merge 2 Fields)          Business Name          Category 1          Category 2          Charitable Number       </div>	<p>Add &gt;</p> <p>Remove &lt;</p>	<p><b>Fields to Import:</b></p> <div style="border: 1px solid gray; padding: 5px;">         First Name          Last Name          Addr1          Addr2          Addr3       </div>	<p>Move Up</p> <p>Move Down</p> <p>Or drag and drop up and down</p>
---	------------------------------------	---	---

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2. Select the Excel or text file containing the donor information to be imported.

Import File:  Browse ...

---

3. Specify the number of lines of column headers that are at the top of the import file.

Header lines to skip in import file:

---

4. Choose the unique donor identifier in each row of the input file for identifying duplicates and matches to existing donors:

☐ Member / Envelope #   
 ☐ Email Address   
 ☒ None

**Choose options for existing donors matching on the unique ID:**

☒ Add all rows from the file as new donors  
☐ Update existing donors from data in matching rows from the file  
☐ Ignore rows from the file matching existing donors  
☐ Ignore additional matching rows for each donor

---

Import
Help
Close
Load Settings
Save Settings

Progress:

The Fields to Import, Import File and the choices you made in the other sections of this window are saved when you click **Import**, and restored on any future visit to this window, so if you have used it with different options before, you may see different settings than the ones above when you open it again.

There is also an option to load and save named sets of settings, which is useful if you have to regularly import files from different sources, with different sets of fields in them. See [below](#) for details.

### **Filling in the Fields on this Window**

In section 1 of the window, you select which fields will be imported from the file, and in which order. It defaults to importing the fields Last Name, First Name, Addr1, Addr2, and Addr3, in



that order, the first time you use it. The **Donor Fields** at the left are all fields that can be imported, that have not yet been added to the **Fields to Import** list at the right. The list of fields at the right shows all fields that you have selected to import, in the order they are expected to be found in the file from which you will import the data.

To import more or fewer fields you can use the **Add** and **Remove** buttons, or double-click on a field in either list. The **Add** button adds a selected field from the Donor Fields list to the Fields to Import list, just below the currently selected field in the Fields to Import List. The **Remove** button removes a selected field from the Fields to Import list and puts it back into the Donor Fields list. Alternatively, double-clicking fields in either list will move them to the other list, exactly as if you had clicked the **Add** or **Remove** button. Certain combinations of columns are impossible, and some columns are required - the program will tell you if you are trying to make a field selection that is not allowed. Please read any messages that come up about this carefully.

If the Fields to Import on the right are in the wrong order, so that they don't correspond to the order in the input file, single-click on one you want to move and use the **Move Up** or **Move Down** buttons to re-arrange them. You can alternatively click and drag fields up and down in that list. (Click on a field, keep holding the mouse button down and move it to the desired position, then release the mouse button.) The Donor Fields list on the left is always in alphabetical order, to simplify finding fields in it.

The following table lists the maximum number of characters in each possible column that can be imported, and describes each column. If your data has either the wrong number of columns, or data that has too many characters in some columns, you will get a detailed error message and the import may be cancelled. For some columns where the data to be imported has too many characters, you will be shown how they will be cut down to fit, and allowed to accept that if you wish. If all rows of data have a consistent number of columns that is more than the number indicated by your selected fields to import, you will be given an option to just ignore the extra columns at the end and continue the import. If there is a problem, you will have to fix up your data and try again.

Field	Max Length	Description
Business Name	60	If the donor is a business or organization, the name of that business
Last Name	30	The donor's last name, or if the donor is an organization, the last name of a contact at the organization
First Name	30	The donor's first name, or if the donor is an organization, the first name of a contact at the organization
Name: First Last	61	The first and last names of the donor, combined into one field (for example "John Smith"). If multiple words are found in this field, the last word is considered to be the last name, and whatever precedes it is considered to be the first name.
Name: Last, First	62	The last and first names of a donor, combined into one field, separated by a comma (for example "Smith, John")
Title	15	A title (such as "Mr." or "Ms.") to come before the donor's First Name
Middle Initial	8	A middle initial to go after the donor's First Name
Addr1	40	The first line of the donor's address (required for Canadian users)
Addr2	40	The second line of the donor's address

Addr3	40	The third line of the donor's address (may contain the postal code if the Postal Code field is not used)
Addr2 (Merge 2 Fields)	40	Merges two fields from the input file (generally City and State/Province) into the Addr2 field in DONATION. You can use this or the regular Addr2 field, never both.
Addr3 (Merge 2 Fields)	40	Merges two fields from the input file (generally City and State/Province) into the Addr3 field in DONATION. You can use this or the regular Addr3 field, never both.
Postal Code	10	The Postal Code or Zip Code of the donor
Phone	18	The donor's phone number. Import values like 1234567 will be reformatted and saved as 123-4567, and values like 1234567890 will be saved as (123) 456-7890.
Charitable Number	20	If the donor is another charity, their charitable number
Member/Env. #	9	A member or envelope number for the donor
Other1	50	Can be used for any consistent information, for example you might use this one for a fax number
Other2	50	Can be used for any consistent information, for example you might use this one for a 2nd email address
Other3	50	Can be used for any consistent information, for example you might use this one for children's names
Other4	50	Same, but only visible if you check a checkbox to show it in the <b>Maintenance</b> ⇒ <b>Main Window Options</b> <a href="#">window</a> .
Other5	50	Same as Other4
Other6	50	Same as Other4.
Comments	Any length	Any desired free-form text about this donor
Pledge Amount	Dollar amount	An annual pledge amount that the donor has pledged to donate. May contain commas at the thousands, but may <b>not</b> include a dollar sign.
Email	60	Email address
Category 1	20	Donor Category 1 value. It will be added if it is not already present in the pull-down list for that field, which is specified with the <b>Maintenance</b> ⇒ <b>Donor Category 1</b> <a href="#">menu option</a> . (The match can be case-insensitive, so for instance "MEMBER" would match an existing value of "Member".)
Category 2	20	Donor Category 2 value. It will be added if it is not already present in the pull-down list for that field, which is specified with the <b>Maintenance</b> ⇒ <b>Donor Category 2</b> <a href="#">menu option</a> . (The match can be case-insensitive, so for instance "MEMBER" would match an existing value of "Member".)
Skip Column(s)	255	See <a href="#">below</a> for details about skipping columns.

Note: You **must** import either a business name or both the last and first name for each donor (or all three). So those fields (either a business name, or both the first and last names) must be filled in on every row, in the input file. The first and last name can be input as separate fields, or via the combined fields "Name: First Last" (which will import things like "John Smith") or "Name: Last, First" (which will import things like "Smith, John").

The Addr1 field must always be among the selected fields for importing. For Canadian users, at least one address field must be filled in on every row in the input file, because the Canada Revenue Agency requires donors' addresses to be printed on charitable receipts.

If multiple address fields are being imported, and earlier ones (like Addr1) are empty in the input data while later ones (like Addr2) are filled in, they will be moved up, for instance moving the Addr2 value into the empty Addr1 field, etc.

If you intend to also [import donations](#), you must import either the **Member/Env. # field** or the **Email Address field**, because one of those fields is required to be included in the donations import file, to match the donation to a donor.

### **Figuring out which Columns of your File to Import into which Donor Fields**

Ultimately it is your responsibility to analyze the data in the file you want to import, and correctly associate it with the desired Fields to Import, in the correct order. Most errors you make as you try to get this to work will be identified by error messages, or visible when you are shown the data to be imported later in the process.

If you absolutely cannot figure this out yourself and need assistance, we can help, but potentially complex work like that would **not** be part of our normal paid support expectations. It would be charged, after getting your agreement of course, at our normal hourly rate.

### **Skipping Columns**

The "Skip Column(s)" field from the Donor Fields list is of course not really a donor field. Adding it will prompt you for a number of columns in the input file to skip. An entry such as "Skip 1 Column" or "Skip N Columns" (where N is a number) will then appear in Fields to Import list at the right, based on what you entered. Where you position it in that list with the **Move Up** or **Move Down** buttons (or drag and drop) will determine where extra columns are expected to occur, that should be ignored when importing.

If there are extra columns at the end of the lines in the import file that you do not need to import, you don't actually have to add a "Skip Column(s)" for that. Instead, when you do the import, you will be informed that there are more columns in the import file than you have specified to be imported, and asked to confirm that you are OK with that. If you confirm that, the import will proceed, ignoring those columns at the end. However, if you want to avoid that question, you certainly **can** add an appropriate "Skip Column(s)" at the end of your Fields to Import list to account for all of the fields to be ignored at the end of each line.

### **Sections 2 and 3**

In section 2, you specify the name of the Import File that is to be imported. You can either just type it in (include the full path – drive and directory), or use the **Browse** button to bring up a standard File Open window to find the file. It can be a tab-separated text file (\*.txt), either type of Excel file (\*.xls or the newer version, \*.xlsx), or a comma-separated value file (\*.csv).

When you use the **Browse** button, it will start out showing only one type of file, "Microsoft Excel Documents". If you need to import a different type (tab-separated text, or comma-separated value), you can change that by dropping down the file type control near the bottom right of that window.

In section 3, you can specify how many lines of column headers are at the top of the import file. Most commonly this should be set to 0 (if there are no column headers in the file) or 1 (if there is one line of column headers in the file).

### Section 4 Options

This section looks as follows, as a reminder:

4. Choose the unique donor identifier in each row of the input file for identifying duplicates and matches to existing donors:

☐ Member / Envelope #    ☐ Email Address    ☒ None

Choose options for existing donors matching on the unique ID:

☒ Add all rows from the file as new donors  
☐ Update existing donors from data in matching rows from the file  
☐ Ignore rows from the file matching existing donors  
☐ Ignore additional matching rows for each donor

The example above is the initial default, which is to add all imported rows. That would be a natural option if you are using this when you first start using DONATION, to import data that you previously had elsewhere, such as in Excel. It would also be appropriate if you are importing additional donors and you are positive that they are not already in your Donor List.

When the radio button for the unique donor identifier (unique ID) in the first row of radio buttons is set to None, all of the other options below it in this section are greyed out (disabled) and **Add all rows from the file as new donors** is automatically selected.

However, if you know that your input file contains either a number field matching Member / Envelope Numbers of existing donors in your program, or an email address field matching them, you can select the radio button for that field on the first row here, and then the other options become available.

If you are using the Email Address as the unique ID, you will need to make sure that any email addresses in the input file, that are for donors already in your Donor List in DONATION, are actually recorded as that donor's email address in the program. (Otherwise, they will be added as new donors, causing duplication!)

The next three radio buttons only apply if you have selected a unique ID field on the first row here. They determine what happens if an input line contains a value of that unique ID matching an existing donor in the current year's Donor List. Here is what each of those three options means:

- **Add all rows from the file as new donors:** Whether or not there is a matching existing donor in your Donor List, this will always attempt to add the row. If you are importing the Member/Envelope # field, and values in it match existing donors, this option will cause the import to be rejected, because values in that field must always be unique in DONATION.
- **Update existing donors from data in matching rows from the file:** With this option, for rows to be imported that match existing donors in the Donor List on your selected unique ID field (Member/Envelope # or Email Address), filled-in field data in the import file will update

(overwrite) your existing donor data. Use this option if you believe that the data in the import file is likely to be more correct (or at least as correct!) as your existing data in the Donor List. Entirely empty fields in the input will not overwrite existing data. See also under [Special Processing for Empty Fields when Updating](#) below, though, for a way to force input values to clear existing donor field data.

- **Ignore rows from the file matching existing donors:** With this option, rows in the import file that match existing donors in the Donor List on your selected unique ID field (Member/Envelope # or Email Address) will be completely ignored for import purposes, as if they were not there. Use this option if you believe that your existing data in the Donor List is more likely to be correct than whatever data you are importing.

One combination to be aware of is if you pick the Email Address as the Unique ID field, and select **Update existing donors from data in matching rows from the file**. In that case, if you have two or more existing donors with the same email address as a row in the input file, that will be an error and the import will not be able to proceed. That's because the program cannot know which of the existing donors it should be updating! Most commonly this would be a problem if you have spouses recorded as separate donors, and they share an email address. One solution to this would be to merge them into one donor (since at least in Canada and the U.S.A. they can share each other's tax receipts anyways!), with the **Database ⇒ Merge Duplicate Donors** [menu option](#).

The final checkbox in section 4, **Ignore additional matching rows for each donor**, is about cases where there might be multiple rows in the input file with the same value of your selected unique ID field (Member/Envelope # or Email Address). The most likely situation would be if you are importing data exported from an online donation service, which contains both donor and donation fields on each row, and you are skipping the donation fields. If there were multiple donations from the same donor, you would not want to attempt to import that donor more than once! Checking this checkbox means that only the first row in the input file with a given value of your selected unique ID field will be imported. All further rows with the same unique ID field will be ignored for import purposes, as if they were not there.

The **Ignore rows from the file matching existing donors** radio button and the **Ignore additional matching rows for each donor** checkbox can both cause input file rows to be ignored, so at first this could seem confusing. But the first one ignores them if they match existing donors in your donor list, and the second one ignores them if they occur repeatedly in the input file. Depending on your exact situation, it may be appropriate to use neither of them, one of them, or both of them!

### **Starting the Import**

Once you have entered your desired choices for sections 1 to 4, click the **Import** button. The first thing that will happen is that it will read the import file, and look for problems in it. If there are any problems, it will tell you that fact, and display the list of problems in a window. Print off that list for later fixing, then close that window. An example of such a problem is a missing Last Name, a missing address, data in a field that is too long for the field lengths in DONATION, or a duplicate Member/Envelope Number if you aren't updating or ignoring them.

That file clearly separates out unfixable problems (like missing required fields) from ones that it will try to fix for you (like overly long names). If there were unfixable problems, you will have to go back to the original file being imported, make the appropriate fixes, and then try the import again.

If you selected to allow updating existing donors, and the program detects that some donors will in fact be updated, you will be asked to confirm that you want to do that.

If duplicate names are detected, matching existing names, that aren't being updated based on a matching Member / Envelope Number or Email Address, you will be told about that, and asked to review it carefully before confirming the import.

You will also be told if input rows are being skipped due to options you selected in section 4. Entirely blank lines in the input file will also be skipped.

### **Reviewing your Data**

Next, the data to be imported will be displayed for you. Take a good look at it. Make sure the right data is shown with the right fields, and that the row of headers from your data is not displayed. (Note: the program will have put in its own headers, in boldface and with a line under them, so what you are checking is that you don't seem to have a row of headers under that!) Also check that all of the donors you expected to be displayed are in fact displayed.

The first column (Status) shows "New" if this row will be imported as a new donor. It can also show "Duplicate?" if this row will be imported as a new donor, but it has the exact same name (except possibly for different capitalization) as an existing donor. That could be an error, or of course you could be adding a second person with a common name like "John Smith"!

If you have selected to allow updating existing donors, the Status column can show "Updated" if it will update an existing donor that was matched by Member/Envelope Number or Email Address, or "Unchanged" if it is a match to an existing donor but no changes were observed.

If everything looks fine, click **Import** and the import will begin. If there are problems with what you see in the data preview window, just click **Cancel** instead, and the Import will not be done.

After you click **Import** in the preview window, it will perform the import. When it is done, it will tell you so, then close the Import window.

As the data is being imported, progress will be showing in the bar at the bottom of the window.

If fixable errors were shown in the window and you printed them off, you should now go back in the DONATION program's main window to each donor that had an error displayed in that printout, and decide how or whether you wish to fix it in the imported record.

### **Special Processing for Empty Fields when Updating**

There's a problem if you are updating existing donors, in distinguishing whether an empty field means you just aren't updating whatever is already in the Donor Details for that field, or whether it means you want to clear the contents of that field.

To allow you to distinguish between those two cases, we came up with a trick:

- An input field that is actually empty will never replace an existing value in a matched donor being updated. The existing value will still be there after the import.

- An input field that contains exactly the value "empty", without the quotes, will cause that field in the matched donor to be cleared.

For donors being added, rather than updated, either an empty field or the value "empty" in the field will cause the resulting imported field to be empty.

**Note:** We considered using the more commonly used value "n/a" instead of "empty" for this trick, but the problem with that would be that you would then have no way to import the actual value "n/a" into a field, which you might want! We can't really imagine that anyone would want to import the actual value "empty" into a field.

### **Possible Problems with Complaints about Numbers of Rows or Columns**

Sometimes the program will complain that you are only supposed to be importing some number of columns, but some rows have more columns. But when you look at the Excel file, you only see data in the expected number of columns.

Or, it may complain that there are rows with missing data, and the row numbers it mentions appear to be empty and are below the bottom of your data.

In either case, a simple solution is to just copy the rows and columns that do have data in them out of this Excel file, and paste them into another file. Then import that other file instead!

### **Importing from Membership Plus or other programs whose fields don't match DONATION's organization**

First, please note that from all versions of Membership Plus that we have encountered, you can use the **Database ⇒ Import ⇒ From Membership Plus** [menu option](#) to import more than just the donors - it imports your organization info, donation categories (funds), donors (members) and donations (contributions). So it is very unlikely that you would choose to use **Database ⇒ Import ⇒ Donors** to import data from that program.

However, if you want to import **only** your donors from Membership Plus, or you have a version of Membership Plus that the menu option mentioned above doesn't work for, you can still use the **Database ⇒ Import ⇒ Donors** menu option described above.

First, use Membership Plus's Export Wizard to export the donor fields to an Excel file. You may want to open that file to confirm that the fields are organized in a way that can be imported into DONATION, based on the list of columns above.

The only complication is that in Membership Plus, there are separate City and State fields. You handle that in DONATION by importing them using the "Addr2 (Merge 2 Fields)" field, or if you have two lines of address preceding those fields, the "Addr3 (Merge 2 Fields)" field.

Other than that, the import should be straightforward.

Other programs (or simple custom Excel donor and donation-tracking spreadsheets) may have their donor names merged into one field, instead of separated into First Name and Last Name fields as in DONATION. Use the "Name: First Last" or "Name: Last, First" import fields in this window to handle that situation, depending on whether the donor names were stored as "John Smith" or "Smith, John" respectively.



### **Loading and Saving Settings**

As mentioned above, when you click **Import**, your settings in this window are automatically saved, and automatically restored the next time this window is opened.

However, some users may need to regularly import donors from more than one external source, where the files have different fields in them, in different orders. The **Load Settings** and **Save Settings** allow you to save and re-load your settings for multiple import files.

Once you have your settings set up as desired for one import file, click **Save Settings** to save them. You will be prompted for a name to save them with. If you were for instance using this for importing donors exported from PayPal, you might use "PayPal" as that name.

Then when you return to this window in the future, if you most recently used other settings, those settings will be shown. In that case, you can click **Load Settings** to re-load any settings you saved and named before. If there is more than one saved set of named settings, you will be prompted with a list, so you can choose which one to load. That list also has a **Delete** button that allows you to delete a previously saved set of named settings.

If you have either loaded or saved settings during one use of this window, and then you do an **Import**, your current settings will, as always, be automatically saved, and then automatically loaded the next time this window is opened. In addition, if you have changed the settings at all since the load or save, you will be prompted as to whether you also wish to re-save them to the last named settings that you loaded or saved.

## **5.17 Importing Donations or Recurring Donations from Excel, Text or CSV Files**

The option **Database** ⇒ **Import** ⇒ **Donations** can be used for two different purposes:

1. You can use it to import donations from a previous program when you first start using DONATION. (This would generally be preceded by [Importing Donors](#).)

**Note:** To import multiple years of donations, you have to split them into one file for each year, then move to successive years with the **Database** ⇒ **Change Year** [menu option](#), and import the donations for each year when you are in it.

2. You can use it to import regular or recurring donations, such as monthly donations, in the case where lots of donors have given you either a series of monthly cheques or pre-authorized bank withdrawals or credit card charges. (There is also a different way to memorize and set up automatic weekly or monthly [recurring donations](#), that you may prefer to use.)

In both cases the usage is the same.

If your file to be imported contains both donor and donation information on the same line, it will probably be preferable to use the **Database** ⇒ **Import** ⇒ **Donors and Donations** [menu option](#), which does all of the importing in one step. For this to work, each line would also have to contain a field that you can use as a unique identifier (also called unique ID) matching a field that you will import into DONATION, which will be either the Member/Envelope # field, or the Email Address.

There are special menu options for importing donor, donation and category data from certain other programs, which should be used instead of this feature if you are switching from one of those programs. See the following topics if they apply:

- [Converting Data from Membership Plus](#)
- [Converting Data from GiftWorks](#)
- [Converting Data from PowerChurch Plus](#)
- [Converting Data from Roll Call](#)
- [Converting Data from The Church Assistant](#)
- [Importing Data from Viansoft Church Contribution System](#)
- [Converting Data from Geminon](#)

If you want to import your Organization Info, Donors, Donations, donation Categories and possibly Receipts together when you first start using the program, and you are **not** switching from one of the programs listed above, you may prefer to look at the option [Importing all Data from Other Programs](#). However, that is **much** more complicated than just importing the donors followed by importing the donations, so very few users attempt it.

If you are using the United Church of Canada's PAR (Pre-Authorized Remittance) service, you can instead use the **Database ⇒ Import ⇒ PAR Donations** [menu option](#).

The **Database ⇒ Import ⇒ Donations** routine imports the Donation data from an Excel file, tab-separated text file or comma-separated value (CSV) file. If you select an Excel file to import, DONATION will have Excel invisibly save it to a CSV file (described below), and then actually import that CSV file.

A tab-separated text file is a plain-text file where each donation is on its own line, and each field on the line (even optional fields that have no data for the current donation) is separated by one tab character. Fields may optionally be enclosed in quotation marks, but that is not necessary. The file may optionally have one or two rows of column headers at the top. If you currently have the data in a spreadsheet program such as Excel, you can easily export it to tab-separated text with the **File ⇒ Save As** menu option, using the Save as type "Text (Tab Delimited)" or "Unicode Text" if your data might include accented characters, or characters that are not part of the English alphabet.

A comma-separated value (CSV) file is somewhat similar to a tab-separated text file, but a comma rather than a tab separates the fields on each line, and fields containing commas (or double quotes) are enclosed in double quotes. If you currently have the data in a spreadsheet program such as Excel, you can easily export it to CSV with the **File ⇒ Save As** menu option, using the Save as type "CSV (comma delimited)" or "CSV UTF8 (comma delimited)" if your data might include accented characters, or characters that are not part of the English alphabet. If you specify to import an Excel file, DONATION will actually do that save to CSV for you, and then import the CSV file.

Other spreadsheet programs (like OpenOffice Calc) may only have options to save files as CSV - that works too, although you will have to do that saving manually. DONATION cannot do that conversion for you if you do not have Excel installed.

In whatever file format you use, it is **strongly** recommended to use a header row with column headings in it, both to remind you of what to put into those columns, and to make sure that the correct number of columns are found (especially if you are importing directly from Excel).

What follows is a description of the tab-separated columns of data that can be imported from the file of donations. They can occur in your input file in any order, as explained further below.

The table lists the maximum number of characters in each possible column that can be imported, and describes each column. If your data has either the wrong number of columns, or data that has too many characters in some columns, you will get a detailed error message and the import may be cancelled. For some columns where the data to be imported has too many characters, you will be shown how they will be cut down to fit, and allowed to accept that if you wish. If all rows of data have a consistent number of columns that is more than the number indicated by your selected fields to import, you will be given an option to just ignore the extra columns at the end and continue the import. If there is a problem, you will have to fix up your data and try again.

<u>Field</u>	<u>Max Length</u>	<u>Require d</u>	<u>Description</u>
Member/Env. #	9	Y	A member or envelope number for the donor giving this donation. Either this or the Email field (but not both) must be included to identify the matching donor.
Email	60	Y	An email address for the donor giving this donation. Either this or the Member/Env. # field (but not both) must be included to identify the matching donor.
Date Received	n/a	Y	A date in a display format that will be accepted by the program, such as the format you see in the Donation Details area of the program's main window. More technically, the formats that are accepted by the program will be the Short Date Format and Long Date Format from Control Panel's Regional and Language Options tool.
Total Amount	n/a	Y	The total amount of the donation given by the donor. Decimal places and cents are optional.
Category	128	Y	The description of this donation category. If a new category is encountered, you will be prompted with a window where you can choose whether to add it to the list maintained with the <b>Maintenance ⇒ Donation Categories</b> <a href="#">menu option</a> , or translate it to one of those existing categories. The actual maximum category length is 20, but they can be truncated from longer imported values. See <a href="#">New Categories</a> below for more details.
Cheque Number / Paid By	20	N	The cheque number that this donation was paid with, or any text describing how the donation was paid. Standard options include "Cash", "Check" or "Cheque", "VISA", "MasterCard", "Money Order", "Credit Card", "Direct Debit", "Debit Card", "PAC", "PAR", "PayPal", "Non-Receiptable", and "Pre-Receipted". This field may also be blank, or automatically overwritten with "Pre-Receipted" or another value, depending on the options you pick in section 5 of the window.
Eligible Amount	n/a	N	In the case of <a href="#">Split Receipting</a> in Canada, the eligible amount of the donation for tax purposes. Only enter this if it is less than the Total Amount.

Description	50	N	The Description of the donation.
Advantage Description	50	N	Only needed for Gifts in Kind in Canada when there is also an Eligible Amount less than the Total Amount. See <a href="#">Split Receipting</a> .
Skip Column(s)	n/a	N	See <a href="#">below</a> for details about skipping columns.

DONATION can actually store several additional fields about Gifts in Kind for Canadian users, particularly [appraiser](#) information. Since gifts in kind are generally one-off situations (particularly ones that require appraisal) we do not see a reason that you would want to import them rather than entering them normally in the program, so those appraiser fields cannot be imported.

You can create the import file in a couple of different ways. Usually, you would create the file in a spreadsheet program such as Microsoft Excel, and have DONATION import from that file. Alternatively, you can use a text editor (such as Notepad) or a word processor (such as Microsoft Word) to create a tab-separated text file. If you use the word processor, make sure you use **File** ⇒ **Save As** to save the file, and select to save it as type "Text only" or words to that effect.

Each line of the file must always include at least four fields: one of the first two fields listed above (Member/Env. # or Email), and the Date Received, Total Amount, and Category, though they can be in any order. For any fields you specify that are not filled in, if you are using a text file, there must still be a tab on each line, separating where it would go from the preceding field's value. Then in addition, depending on your selections for including the Cheque # / Paid By, Eligible Amount, Description and Advantage Description fields in the window, each line of the file may need to instead have between 5 and 8 fields in it, or more if you use the Skip Column(s) option.

Here is a sample file in Excel, with a selection of 7 columns shown:

	A	B	C	D	E	F	G
1	Env. #	Date	Amount	Category	Cheque # / Paid By	Eligible Amt	Description
2	1	06/30/2014	1,000.00	General			In Memoriam
3	2	06/30/2014	600.99	Refugee Committee	VISA	500	Fundraising Dinner
4	2	06/30/2014	600.00	General	VISA		

It is important to understand that this procedure does not ever **replace** or edit any existing donation data. Rather, it always always **adds** additional donations into your database. All existing donations will stay there. This procedure also is very careful to identify duplicates. If any donation in the file to be imported has the same donor (identified by the Member/Envelope # or Email), Date Received, Amount and Category as an existing donation, you receive a detailed message about it and the whole import will be cancelled. The reason it is cancelled in this situation is that you are most likely importing the same file for a 2nd time, which is obviously not desirable! (However, it is OK if the file itself contains such duplicates. This could happen if you had sections of the same donation that needed different Descriptions, so it was split into two or more donations.)

You may choose to use the Member/Envelope # to identify the donor that each donation is for. If you do that, even if your organization does not normally assign Member or Envelope numbers to donors, you must do so for the donors that you want to use this import donations feature for. That means that you need to ensure that the field for showing the Member/Env #

in the [Donor Details](#) tab of **Maintenance** ⇒ **Main Window Options** is checked, since that makes the Member/Envelope # field in the Donor Details area visible. For more details on how to enter Member/Envelope numbers, see [Entering a New Donor](#).

Alternatively, you may choose to use the Email to identify the donor that each donation is for. If you do that, obviously the donors for whom you are importing donations must have those email addresses recorded. And you need to ensure that the field for showing the Email in the [Donor Details](#) tab of **Maintenance** ⇒ **Main Window Options** is checked, since that makes the Email field in the Donor Details area visible.


One potential problem with using Email to identify the donor is that it will not work if you are importing donations with an email address that occurs in two or more donors in the current year. If those donors are spouses, one solution may be to merge them with the **Database** ⇒ **Merge Duplicate Donors** [menu option](#). That will generally be OK since at least in Canada and the U.S.A., spouses can claim each other's charitable donations on their taxes.

If the donors for the donations you are importing were themselves imported via the [Import Donors](#) routine, they must have been imported with a Member/Envelope Number or Email included among their fields, or the donation importing will not be able to do the required matching.

Also, if you plan to import Eligible Amounts, Descriptions and/or Advantage Descriptions, you must ensure that those fields are displayed on the main window, via the Donation Details tab of **Maintenance** ⇒ **Main Window Options**. Otherwise those fields will not be displayed as options on this window.

### **Filling in the Import Window**

When you select **Database** ⇒ **Import** ⇒ **Donations**, the following window comes up. The options shown are the defaults the first time you use the window.

 Import 2020 Donations (Default settings) X

This utility will import donations, including regular monthly ones, from an Excel, tab-separated text or CSV file. Please click the Help button to understand the required file format.

---

1. Select the fields of donation information from the list at the left, and insert them into the list at the right in the order they are present in your import file.

**Donation Fields:**

Advantage Description  
 Description  
 Eligible Amount  
 Email  
 Skip Column(s)

Add >

Remove <

**Fields to Import:**

Member/Env. #  
 Date Received  
 Total Amount  
 Category  
 Cheque # / Paid By

Move Up

Move Down

Or drag and drop up and down

---

2. Select the Excel or text file containing the donation information to be imported.

Import File:  Browse ...

---

3. Specify the number of lines of column headers that are at the top of the import file.

Header lines to skip in import file:  (up/down arrows)

---

4. Adjust the month and year of the dates?

☐ Adjust to Current Month
 ☐ Adjust to Last Month

---

5. Specify the value for the Cheque # / Paid By field.

☒ From Imported Field
 ☐ Empty

☐ "Pre-Receipted"
 ☐ Specified Value:

---

Import
Help
Close
Load Settings
Save Settings

---

Progress:

In section 1 of the window, you select which fields will be imported from the file, and in which order. It defaults to importing the fields shown in the image above, in that order, the first time you use it. The **Donation Fields** at the left are all fields that can be imported, that have not yet been added to the **Fields to Import** list at the right. The list of fields at the right shows all fields that you have selected to import, in the order they are expected to be found in the file from which you will import the data.

To import more or fewer fields you can use the **Add** and **Remove** buttons, or double-click on a field in either list. The **Add** button adds a selected field from the Donation Fields list to the Fields to Import list, just below the currently selected field in the Fields to Import List. The **Remove** button removes a selected field from the Fields to Import list and puts it back into the Donation Fields list. Alternatively, double-clicking fields in either list will move them to the other list, exactly as if you had clicked the **Add** or **Remove** button. Certain combinations of

columns are impossible, and some columns are required - the program will tell you if you are trying to make a field selection that is not allowed. Please read any messages that come up about this carefully.

One definite rule you may encounter is that only one of the Member/Env. # and Email fields can be specified as being part of your import. That field will be what is used to identify the donor that the donation is for. If you try to Add or Remove one of those two fields to or from the Fields to Import list, the other one will replace it automatically, after you confirm that that is OK.

If the Fields to Import on the right are in the wrong order, so that they don't correspond to the order in the input file, single-click on one you want to move and use the **Move Up** or **Move Down** buttons to re-arrange them. You can alternatively click and drag fields up and down in that list. (Click on a field, keep holding the mouse button down and move it to the desired position, then release the mouse button.) The Donation Fields list on the left is always in alphabetical order, for ease of finding fields in it.

### **Figuring out which Columns of your File to Import into which Donation Fields**

Ultimately it is your responsibility to analyze the data in the file you want to import, and correctly associate it with the desired Fields to Import, in the correct order. Most errors you make as you try to get this to work will be identified by error messages, or visible when you are shown the data to be imported later in the process.

If you absolutely cannot figure this out yourself and need assistance, we can help, but potentially complex work like that would **not** be part of our normal paid support expectations. It would be charged, after getting your agreement of course, at our normal hourly rate.

### **Skipping Columns**

The "Skip Column(s)" field from the Donation Fields list is not a real donation field. Adding it will prompt you for a number of columns in the input file to skip. An entry such as "Skip 1 Column" or "Skip *N* Columns" (where *N* is a number) will then appear in Fields to Import list at the right, based on what you entered. Where you position it in that list with the **Move Up** or **Move Down** buttons (or drag and drop) will determine where extra columns are expected to occur, that should be ignored when importing.

If there are extra columns at the end of the lines in the import file that you do not need to import, you don't actually have to add a "Skip Column(s)" for that. Instead, when you do the import, you will be informed that there are more columns in the import file than you have specified to be imported, and asked to confirm that you are OK with that. If you confirm that, the import will proceed, ignoring those columns at the end. However, if you want to avoid that question, you certainly **can** add an appropriate "Skip Column(s)" at the end of your Fields to Import list to account for all of the fields to be ignored at the end of each line.

### **Other Sections of the Window**

In section 2, you specify the name of the Import File that is to be imported. You can either just type it in (include the full path – drive and directory), or use the **Browse** button to bring up a standard File Open dialog box to find the file. It can be a tab-separated text file (\*.txt), either type of Excel file (\*.xls or the newer version, \*.xlsx), or a comma-separated value file (\*.csv).



When you use the **Browse** button, it will start out showing only one type of file, "Microsoft Excel Documents". If you need to import a different type (tab-separated text, or comma-separated value), you can change that by dropping down the file type control near the bottom of that window.

In section 3, you can specify how many lines of column headers are at the top of the import file. Most commonly this should be set to 0 (if there are no column headers in the file) or 1 (if there is one line of column headers in the file). It defaults to 1 the first time this window opens, so it will probably be easiest for you if you put one line of headers in the import file.

Section 4 is used if you have recurring monthly donations, and don't want to have to edit the dates in the import file each month. (However, see also [Recurring Donations](#) for another way to handle such donations!) In this section, you can specify that you want all of the dates in the file to be imported to be adjusted, either to a date in the current month, or in the previous month. (This will depend on your processes - whether you run the import at the end of the relevant month, or sometime in the following month.) If you leave both checkboxes unchecked, the dates will be imported exactly as they are in the file, and must be within the current year. If you check one of the checkboxes, the dates will be adjusted appropriately. If a date in the import file is at a month-end and the month you are importing into has fewer days in the month, it will be adjusted appropriately. (For instance, if the date in the import file is 01/31/2020, and you are importing for February 2020 - a leap year - it will be imported as 02/29/2020.)

If you do not check the option in Section 4 for adjusting the dates, then all of the dates in the import file must in the current year that the program is working on. That will be a calendar year unless you are in a country like the United Kingdom, Australia or New Zealand and you are [Using Fiscal Data Entry and Receipting](#), as described in that linked topic.

The options in section 5 determine what is imported into the Cheque # / Paid By field. If you have selected that as one of the Fields to Import in section 1, the **From Imported Field** radio button in this section will be selected, and no other radio button options here will be allowed. If you do **not** select that field as one of the Fields to Import, you have three other fairly self-explanatory options:

- **Empty**: don't put anything into that field
- **"Pre-Receipted"**: put exactly that value into the field, which will cause the imported donations to never be included in official receipts. (See [Non Receiptable Donors and Donations](#) for details.) This would be used for importing from any 3rd party service that sends out the official receipts itself, such as CanadaHelps.org.
- **Specified Value**: If you check this, you have to enter your desired value in the entry field following it, and that value will be put into the Cheque # / Paid By field for all donations you import.

Once you have used this window (and clicked **Import**) once, the next time you open it all of the settings that you used last time, including list of Fields to Import and the Import File name, will be redisplayed, since it is most likely that each import will use the same settings.

### **Doing the Import**

Once you have entered your desired choices for sections 1 to 5, click the **Import** button. The first thing that will happen is that it will read the import file, and look for problems in it. If there are any problems that are fixable, it will tell you that fact, and display the list of problems in a

window. You should print that list off for later fixing, then close that window. An example of such a problem is a field that is too long for the field lengths in DONATION. If the problem is not fixable in an obvious way (for example an Amount that does not appear to be numeric), it may just give you a message about it and stop the importing process.

Entirely blank lines in the input file will be skipped. They are not treated as errors.

The The Fields to Import, Import File and the choices you made in the other sections of this window are saved when you click **Import**, and restored on any future visit to this window, so if you have used it with different options before, you may see different settings than the ones above when you open it again.

There is also an option to load and save named sets of settings, which is useful if you have to regularly import files from different sources, with different sets of fields in them. See [below](#) for details.

### **New Categories**

If there are Category values in the import file that have not been imported before, and do not match any category descriptions that you already have in DONATION, a window for dealing with that will be displayed. It allows you to associate the new ones with existing categories, or create your desired shorter forms (maximum 20 characters) for new categories.

See [Importing New Categories](#) for full details.

### **Handling Errors and Warnings and Continuing**

If there are unfixable problems on the first data line (after any column header lines) they will be shown to you immediately, rather than analyzing the rest of the input file first, because it probably indicates that your settings in this window are incorrect - wrong number of columns, columns in the wrong order, etc.

However, if there are more columns on the first data line of the input file than you have specified in the Fields to Import, you will be given an option to import the file anyways, ignoring the extra columns. All rows of the file must have the same number of columns as every other row!

That file displayed to you in the window clearly separates out unfixable problems (like missing required fields) from ones that it will try to fix for you (like overly long names). If there were unfixable problems, you will have to go back to the original file being imported, make the appropriate fixes, and then try the import again.

The data to be imported will now be displayed for you, if there were no unfixable problems. Take a good look at it. Make sure the right data is shown with the right fields, that any rows of headers from your data are not displayed, and that dates have been adjusted appropriately if you used one of the checkboxes in section 4. (Note: the program will have put in its own headers, so what you are checking is that you don't seem to have two or more rows of headers.) Also check that all of the donations you expected to be displayed are in fact displayed. Finally, you can check the count and dollar total of the donations in the summary at the end of the list. If everything looks fine, click **Import** in the window displaying the data to be imported, and the import will begin. If there are problems with what you see in the data preview window, click **Cancel** and the Import will not be done.

As the data is being imported, progress will be showing in the bar at the bottom of the window.

Note that in this preview window, there are columns for the optional columns Cheque # / Paid By, Eligible Amount, Description and Advantage Description, whether or not you are importing those fields or displaying them on the program's main window. If you aren't importing one of those fields, the values in that column will just be empty.

After you click **Import** in the preview window, it will perform the import. When it is done, it will tell you so, then close the Import window.

If fixable errors were shown in the window and you printed them off, you should now go back in the DONATION program's main window to each donor and donation that had an error displayed in that printout, and decide how or whether you wish to fix it in the imported record.

### **Possible Problems with Complaints about Numbers of Rows or Columns**

Sometimes the program will complain that you are only supposed to be importing some number of columns, but some rows have more columns. But when you look at the Excel file, you only see data in the expected number of columns.

Or, it may complain that there are rows with missing data, and the row numbers it mentions appear to be empty and are below the bottom of your data.

In either case, a simple solution is to just copy the rows and columns that do have data in them out of this Excel file, and paste them into another file. Then import that other file instead!

### **Loading and Saving Settings**

As mentioned above, when you click **Import**, your settings in this window are automatically saved, and automatically restored the next time this window is opened.

However, some users may need to regularly import donations from more than one external source, where the files have different fields in them, in different orders. The **Load Settings** and **Save Settings** allow you to save and re-load your settings for multiple import files.

Once you have your settings set up as desired for one import file, click **Save Settings** to save them. You will be prompted for a name to save them with. If you were for instance using this for importing donations exported from PayPal, you might use "PayPal" as that name.

Then when you return to this window in the future, if you most recently used other settings, those settings will be shown. In that case, you can click **Load Settings** to re-load any settings you saved and named before. If there is more than one saved set of named settings, you will be prompted with a list, so you can choose which one to load. That list also has a **Delete** button that allows you to delete a previously saved set of named settings.

If you have either loaded or saved settings during one use of this window, and then you do an **Import**, your current settings will, as always, be automatically saved, and then automatically loaded the next time this window is opened. In addition, if you have changed the settings at all since the load or save, you will be prompted as to whether you also wish to re-save them to the last named settings that you loaded or saved.

## 5.18 Importing PAR Donations

The **Database ⇒ Import ⇒ PAR Donations** menu option allows you to import data files with donation information from the United Church of Canada's PAR (Pre-Authorized Remittance) service. If your church or organization is not using this specific PAR service, this menu option will be of no interest to you.

If you are not using the PAR service, or wish to import donations from another source or have other recurring donations set up in a different way, you have two other options:

1. Use the **Database ⇒ Import ⇒ Donations** [menu option](#), which can handle recurring monthly donations.
2. Memorize and set up automatic weekly or monthly [recurring donations](#).

When you select the **Database ⇒ Import ⇒ PAR Donations** menu option, the following window will come up:

**Import PAR Donations**

This utility will import donations from the United Church of Canada's PAR service.

1. Specify whether you want to be given a chance to review the donations before importing them.  
☒ Check this to review the information before doing the import.
2. Select the text file containing the donation information to be imported.  
**Import File:**  **Browse ...**
3. Specify the three categories to import the donations for PAR's Local, Mission and Other categories into.  
**General/Local:**   
**Mission and Service:**   
**Other:**
4. Specify the date to import the donations with.  
**Date:**

**Import** **Help** **Close**

Please note that this process will only work if you have informed the PAR service of the envelope numbers of all donors making PAR donations, because those envelope numbers have to be used to match up the donors in the PAR file with your donors in DONATION. In

addition, you have to specifically request that they send you the importable text file monthly, not just the formatted PDF report that they normally send.

In section 1 of this window, you can select whether or not you wish to review the donations to be imported, before the import is completed. This is strongly recommended, because it allows you to see the names of the donors, along with the envelope numbers. (Only envelope numbers are included in the import file.)

In section 2, you specify the name of the file to be imported. This is the text file (not the PDF file!) that the PAR service will provide to you monthly, if you have requested it, containing the details of all PAR donations for the month. It is sent as an email attachment, which you will have to save to a folder where you can find it. One suggestion is to save it in DONATION's [Data Directory](#), because that is where the **Browse** button looks by default.

In section 3, you specify the three DONATION [categories](#) that correspond to the three categories your PAR donors can select to donate to: Local/General, Mission and Service, and Other. The first time you use this, DONATION will try to guess the best match for these categories by name, but if it doesn't guess correctly, you can change the settings. These settings are memorized for you, from month to month.

In section 4, you select the month whose data you are importing. As we understand it, the PAR donations are always processed on the 20th of the month (or the next business day, if the 20th isn't a business day). So, only 20ths of the month are shown as possible dates. Normally you would accept the default setting here, for the current (or most recent) month, but if you are behind in your work, you might need to select an earlier month from the drop-down list, which goes backwards from the current month to January of the current year.

Once you have selected all of these settings, click **Import** to start the import process. The first thing it does is check the data file for any problems. If there are problems, it will tell you what they are, and cancel the import process. If everything is OK, what happens next depends on the setting in the "Check this to review the information before doing the import" checkbox.

If the checkbox in section 1 is checked, you are first shown the donations to be imported, with each donor's name. If the donor is donating in multiple categories, there will be one donation row for each of those categories. If everything looks OK, click the **Import** button on the preview window to complete the import.

If the checkbox is not checked, the import is done immediately.

Of course, you can also click **Close** in this window if you want to abandon the import, or **Help** to see this help page.

#### Format of the PAR Import File

The file names are things like 12345678\_Jan-21-15.txt. That's a file from January 21, 2015. we think the numbers at the start of the file's name may identify your organization's account with PAR.

The file consists of lines like:

```
501 1909973 325.00 15.00 0.00
```

The first 10 character positions (at the right end of which you see "501" in the same line above) are the donor's envelope number, which determines which donor the donations on that line get imported into. The next 10 character positions (with "1909973" in them in this example) are ignored by DONATION, and we are not sure what they are, perhaps some sort of internal donor numbers that PAR uses. The next three sections are the three dollar amounts for the donor's donations that month to what PAR considers to be General/Local, Mission and Service, and Other, respectively, which you allocated to your own donation categories in the window shown above. Values of 0.00 are of course ignored when importing them.

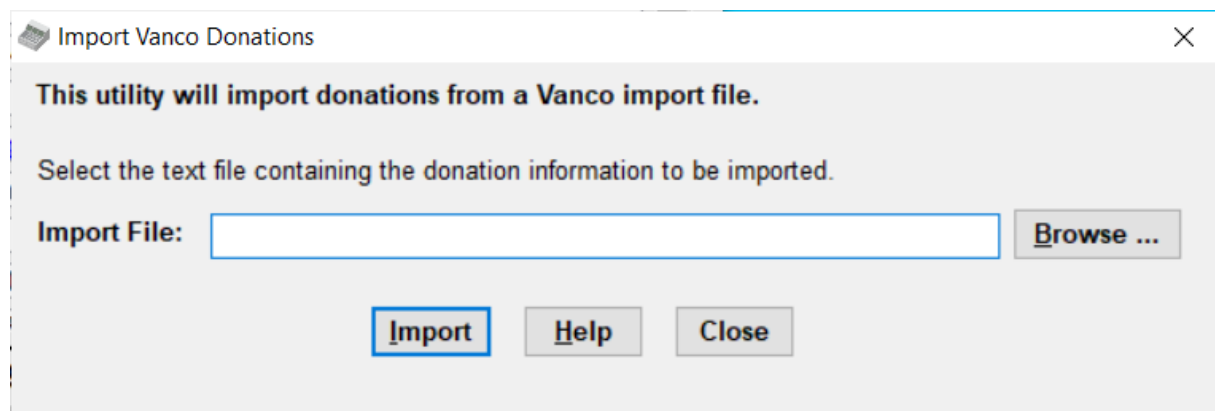
## 5.19 Importing Vanco Donations

Vanco provides an online donation service for churches and charities in the USA and Canada. If you use that service, you can contact them and ask to receive the export files for Software4Nonprofits. Our understanding is that those files can be emailed to you either daily or weekly, covering the donations you received through Vanco in the previous day or week.

When you receive those emails from Vanco, you will need to save the attached export file, which will have the extension ".csv", to somewhere on your computer where you can find it, for use with the following instructions. (CSV means comma-separated value, a text file with fields usually in quotes, and separated by commas.)

Vanco identifies their donors by ten-digit Customer IDs. To be able to maintain those IDs in the program, you first need to check "Customer IDs" in the Show Fields area of the [Donor Details](#) tab of **Maintenance** ⇒ **Main Window Options**. Once you have done that, among other changes the menu option **Database** ⇒ **Import** ⇒ **Vanco Donations** becomes visible.

Using that import menu option brings up the following window:



If you have used it before, your last-used Import File name will already be displayed in the Import File field. However, normally you will be importing a new file each time, so you can either type the full path for that file in the field, or use the **Browse** button to open a window where you can select it.

### Doing the Import

Once you have the desired file in the Import File field, click **Import**.

### Matching Donation Categories

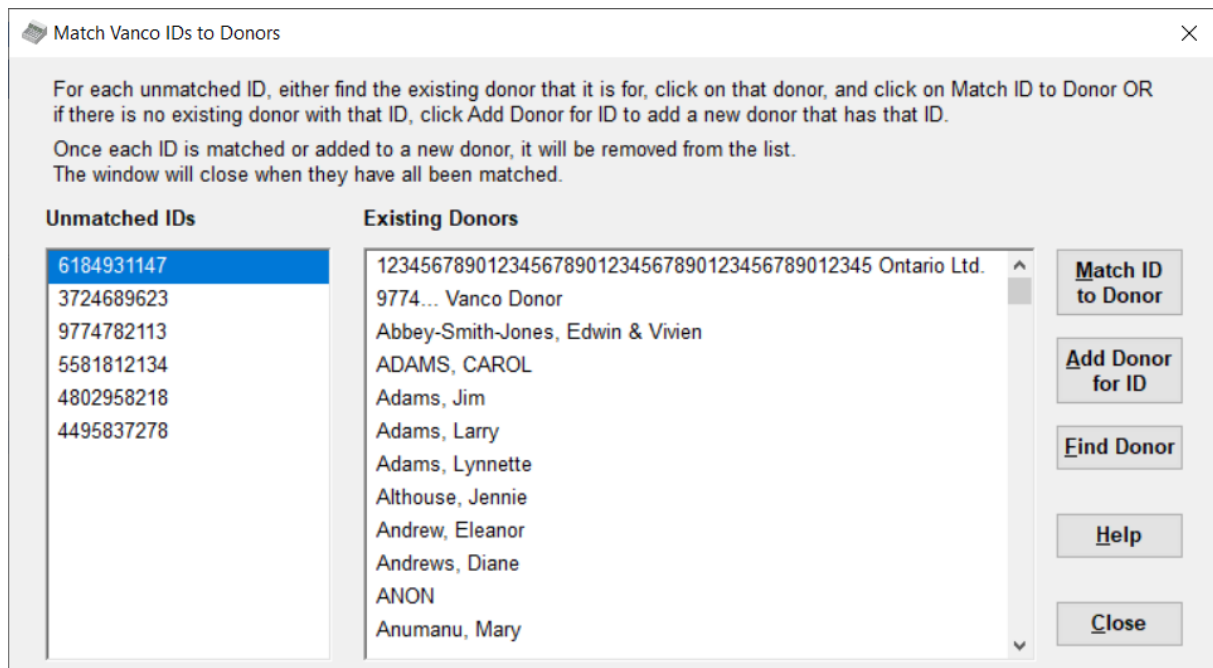
The first thing it will do, after making sure that this appears to be a valid Vanco import file, is check whether any of the lines in the file include donation categories that have not been imported before, and do not match any category descriptions that you already have in DONATION. If that is the case, a window for dealing with that will be displayed. It allows you to associate the new ones with existing donation categories, or create your desired shorter forms (maximum 20 characters) for new categories.

See [Importing New Categories](#) for full details.

### Matching Customer IDs to Donors

Unfortunately, importing donations from Vanco is complicated by the fact that their exported file does not contain any information that DONATION can use to identify the donor, other than their Customer ID. So if all of the Customer IDs in a given import file have been part of imports you have done before in DONATION, that will not cause a problem. However, if some of the IDs are new (or this is the first time you have imported Vanco donations into DONATION) some extra steps will be required to match the Customer IDs to your donors.

In that case, a window such as the following will come up:



The text at the top of the window should be quite self-explanatory.

To determine which ID matches which donor, you will have to use other resources from Vanco. Our understanding is that they send you PDF reports along with your exported donation files, that will show information about the donors, allowing you to do this matching. You can presumably also go online to Vanco to look up donors by Customer ID.

If a Customer ID corresponds to a donor already in DONATION, when that ID is selected in the list at the left, just find and click on the appropriate donor on the right. You can scroll to it to find



it, or use the **Find Donor** button, which works just like the **Ctrl+F Find Donor** feature on the program's main window. Then click **Match ID to Donor** to make that match. That will be done after you answer a question confirming the match.

If the Customer ID does not seem to correspond to any donor in DONATION, click the **Add Donor for ID** button. That will bring up a window for just adding in one donor, just as you could do on the program's main window (or with the **Add Donor** button in the [Batch Entry](#) window). Once you save that donor, the ID will be associated with it.

As you match each ID to an existing or new donor, that ID is removed from the list at the left. Once all of the IDs have been removed, the window will close and the import will continue.

If you close the window before matching all of the IDs, your import cannot continue, but you can come back and finish your work on it later.

Associating Customer IDs to donors can also be done with the **IDs button** in the row of buttons for the Donor Details area of the main window. Some users may prefer to get all of their Customer IDs saved into DONATION in that way, rather than waiting for the above window to be displayed during the importing process.

#### Reviewing the Data to be Imported

Once any new donation categories and IDs have been dealt with (if there were any), the program will check that you are not accidentally re-importing the same file of donations a 2nd time. If any of the donations to be imported have the same Date, Amount and Category as an existing donation for the same donor, the import will not proceed.

If there were no problems, a window will then be displayed in which you can review the donation information to be imported. It shows the donor's Name and Customer ID, and the donation's Date, Amount, Category and Paid By. (The category displayed is the matched Donation Category, not whatever was in the import file from Vanco if that was different and was matched to a Donation Category.) The Paid By (short for Cheque # / Paid By) will always be "Vanco".

Review that, and if it looks correct, click **Import** in that window to complete the import. A message will then come up telling you how many donations were imported.

## 5.20 Importing Donors and Donations from One File

Sometimes you will have an import file that contains both donor and donation information on each line of the file, and you want to import it in one step. The most likely situation where you would want to do this is if your organization accepts online donations from a 3rd-party service, such as [CanadaHelps.org](#), [EasyTithe](#) or [PayPal](#), that have exporting options that export both donor and donation information across one line of a file.

You may be able to do that importing with the **Database ⇒ Import ⇒ Donors and Donations** menu option described here.

If you are using the [Abundant](#) online donation system, there are separate features for configuring it and importing from it described in the [Abundant](#) Help topics. They do not use the **Database ⇒ Import ⇒ Donors and Donations** menu option.

It would likely also be possible to import the same file with separate uses of the **Database ⇒ Import ⇒ Donors** [menu option](#) and the **Database ⇒ Import ⇒ Donations** [menu option](#) on the same file, with appropriate choices of options in the windows that come up. Before trying that, you would need to thoroughly understand both of those features! But it will usually be simpler to use **Database ⇒ Import ⇒ Donors and Donations**.

You will have to carefully examine the columns in such a file to figure out how to correctly set up the options on this window.

The initial setup for these imports will often be quite complicated. So, unless this is the only importing of donors and donations from one file that you do, you will want to save the settings in the import window with the **Save Settings** button once you have them working right. (The import window remembers the last settings you used, including the lists of Fields to Import, the filename of the import file and the choices you made for the other sections of the window. It also redisplayes them the next time you use the window.) When you come back to this window, if the displayed settings aren't the ones you want for this type of file, you can load those settings with the **Load Settings** button.

If you are doing this sort of importing, but you also have recurring donations for existing donors in your program that would otherwise want to import, we recommend doing them with the separate [Recurring Donations](#) feature.

### **The Window and its Options**

Here is a sample filled-in window from **Database ⇒ Import ⇒ Donors and Donations**:

Import 2020 Donors and Donations

1. Select the fields of donor and donation information from the list at the left, and insert them into the list at the right in the order they are present in your import file.

Donor and Donation Fields:		Fields to Import:	
Addr2 (Merge 2 Fields)	Add >	Skip 3 Columns	Move Up
Addr3		Title	
Advantage Description	Remove <	First Name	Move Down
Business Name		Last Name	
Charitable Number		Skip 1 Column	
Cheque # / Paid By			

Or drag and drop up and down

2. Select the Excel or text file containing the donor and donation information to be imported.

Import File: C:\Users\Public\Documents\Cooperstock Software\Donation\Export\Ce Browse ...

3. Specify the number of lines of column headers that are at the top of the import file.

Header lines to skip in import file: 1

4. Choose the unique donor identifier in each row of the input file for identifying duplicates and matches to existing donors:

☐ Member / Envelope # ☒ Email Address

Choose options for existing donors matching on the unique ID:

☒ Update existing donors from data in matching rows from the file

☐ Ignore rows from the file matching existing donors

5. Specify the value for the Cheque # / Paid By field.

☐ From Imported Field ☐ Empty

☒ "Pre-Receipted" ☐ Specified Value:

Import Help Close Load Settings Save Settings

Progress:

If you have used either or both of the **Database = Import = Donors menu option** and the **Database = Import = Donations menu option** before, you will see that the options on this window are basically a combination of the options from those two windows. The list of available Donor and Donations Fields that you can import is a combination of the fields available in those two windows, with the following minor changes for clarity:

- Category, from the list of Donation fields, is renamed to Donation Category.
- Category 1 and Category2, from the list Donor fields, are renamed to Donor Category 1 and Donor Category 2.

In section 1 of the window, you select which fields will be imported from the file, and in which order. It defaults to importing the fields Last Name, First Name, Addr1, Addr2, Addr3, Member/Env. # (or if you are choosing not to display that field, Email), Date Received, Total Amount, Donation Category, and Cheque # / Paid By, in that order, the first time you use it. The **Donor and Donation Fields** at the left are all fields that can be imported, that have not yet been added to the **Fields to Import** list at the right. The list of fields at the right shows all fields that you have selected to import, in the order they are expected to be found in the file from which you will import the data.

To import more or fewer fields you can use the **Add** and **Remove** buttons, or double-click on a field in either list. The **Add** button adds a selected field from the Donor and Donation Fields list to the Fields to Import list, just below the currently selected field in the Fields to Import List. The **Remove** button removes a selected field from the Fields to Import list and puts it back into the Donor and Donation Fields list. Alternatively, double-clicking fields in either list will move them to the other list, exactly as if you had clicked the **Add** or **Remove** button. Certain combinations of columns are impossible, and some columns are required - the program will tell you if you are trying to make a field selection that is not allowed. Please read any messages that come up about this carefully.

If the Fields to Import on the right are in the wrong order, so that they don't correspond to the order in the input file, single-click on one you want to move and use the **Move Up** or **Move Down** buttons to re-arrange them. You can alternatively click and drag fields up and down in that list. (Click on a field, keep holding the mouse button down and move it to the desired position, then release the mouse button.) The Donor and Donation Fields list on the left is always in alphabetical order, to simplify finding fields in it.

The following table lists the maximum number of characters in each possible column that can be imported, and describes each column. If your data has either the wrong number of columns, or data that has too many characters in some columns, you will get a detailed error message and the import may be cancelled. For some columns where the data to be imported has too many characters, you will be shown how they will be cut down to fit, and allowed to accept that if you wish. If all rows of data have a consistent number of columns that is more than the number indicated by your selected fields to import, you will be given an option to just ignore the extra columns at the end and continue the import. If there is a problem, you will have to fix up your data and try again.

Field	Max Length	Description
Business Name	60	If the donor is a business or organization, the name of that business
Last Name	30	The donor's last name, or if the donor is an organization, the last name of a contact at the organization
First Name	30	The donor's first name, or if the donor is an organization, the first name of a contact at the organization
Name: First Last	61	The first and last names of the donor, combined into one field (for example "John Smith"). If multiple words are found in this field, the last word is considered to be the last name, and whatever precedes it is considered to be the first name.
Name: Last, First	62	The last and first names of a donor, combined into one field, separated by a comma (for example "Smith, John")

Title	15	A title (such as "Mr." or "Ms.") to come before the donor's First Name
Middle Initial	8	A middle initial to go after the donor's First Name
Addr1	40	The first line of the donor's address (required for Canadian users)
Addr2	40	The second line of the donor's address
Addr3	40	The third line of the donor's address (may contain the postal code if the Postal Code field is not used)
Addr2 (Merge 2 Fields)	40	Merges two fields from the input file (generally City and State/Province) into the Addr2 field in DONATION. You can use this or the regular Addr2 field, never both.
Addr3 (Merge 2 Fields)	40	Merges two fields from the input file (generally City and State/Province) into the Addr3 field in DONATION. You can use this or the regular Addr3 field, never both.
Postal Code	10	The Postal Code or Zip Code of the donor
Phone	18	The donor's phone number. Import values like 1234567 will be reformatted and saved as 123-4567, and values like 1234567890 will be saved as (123) 456-7890.
Charitable Number	20	If the donor is another charity, their charitable number
Member/Env. #	9	A member or envelope number for the donor
Other1	50	Can be used for any consistent information, for example you might use this one for a fax number
Other2	50	Can be used for any consistent information, for example you might use this one for a 2nd email address
Other3	50	Can be used for any consistent information, for example you might use this one for children's names
Other4	50	Same, but only visible if you check a checkbox to show it in the <b>Maintenance</b> ⇒ <b>Main Window Options</b> <a href="#">window</a> .
Other5	50	Same as Other4
Other6	50	Same as Other4.
Comments	Any length	Any desired free-form text about this donor
Pledge Amount	Dollar amount	An annual pledge amount that the donor has pledged to donate. May contain commas at the thousands, but may <b>not</b> include a dollar sign.
Email	60	Email address
Donor Category 1	20	Donor Category 1 value. It will be added if it is not already present in the pull-down list for that field, which is specified with the <b>Maintenance</b> ⇒ <b>Donor Category 1</b> <a href="#">menu option</a> . (The match can be case-insensitive, so for instance "MEMBER" would match an existing value of "Member".)
Donor Category 2	20	Donor Category 2 value. It will be added if it is not already present in the pull-down list for that field, which is specified with the <b>Maintenance</b> ⇒ <b>Donor Category 2</b> <a href="#">menu option</a> . (The match can be case-insensitive, so for instance "MEMBER" would match an existing value of "Member".)
Date Received	n/a	A date in a display format that will be accepted by the program, such as the format you see in the Donation Details area of the program's main window. More technically, the formats that are accepted by the program will be the Short Date Format and Long Date Format from Control Panel's Regional and Language Options tool.

Total Amount	n/a	The total amount of the donation given by the donor. Decimal places and cents are optional.
Donation Category	128	The description of this donation category. If a new category is encountered, you will be prompted with a window where you can choose whether to add it to the list maintained with the <b>Maintenance ⇒ Donation Categories</b> menu option, or translate it to one of those existing categories. The actual maximum category length is 20, but they can be truncated from longer imported values. See <a href="#">New Categories</a> below for more details.
Cheque Number 20 / Paid By		The cheque number that this donation was paid with, or any text describing how the donation was paid. Common options include "Cash", "Check" or "Cheque", "VISA", "MasterCard", "Money Order", "Credit Card", "Direct Debit", "Debit Card", "PAC", "PAR", "PayPal", "Non-Receiptable", and "Pre-Receipted". This field may also be blank, or automatically overwritten with "Pre-Receipted" or another value, depending on the options you pick in section 5 of the window.
Eligible Amount	n/a	In the case of <a href="#">Split Receipting</a> in Canada, the eligible amount of the donation for tax purposes. Only enter this if it is less than the Total Amount.
Description Advantage	50	The Description of the donation.
Description	50	Only needed for <a href="#">Gifts in Kind</a> in Canada when there is also an Eligible Amount less than the Total Amount. See also <a href="#">Split Receipting</a> .
Skip Column(s)	n/a	See <a href="#">below</a> for details about skipping columns in the input file.

The Donor fields are shown first in the table above, then the Donation fields, and finally the Skip Column(s) field (details below). As mentioned above though, you can import them in any order, and in the Donor and Donations Fields box, they are shown in alphabetical order.

Note: You **must** import either a business name or both the last and first name for each donor (or all three). So those fields (either a business name, or both the first and last names) must be filled in on every row, in the input file. The first and last name can be input as separate fields, or via the combined fields "Name: First Last" (which will import things like "John Smith") or "Name: Last, First" (which will import things like "Smith, John").

For Canadian users, at least the Addr1 field must be filled in on every row in the input file, because the Canada Revenue Agency requires donors' addresses to be printed on charitable receipts.

If multiple address fields are being imported, and earlier ones (like Addr1) are empty in the input data while later ones (like Addr2) are filled in, they will be moved up, for instance moving the Addr2 value into the empty Addr1 field, etc.

To match the donors to existing donors in your database, and to keep the donors together with their donations, **you must import at least one of the Member/Env. # field and the Email Address field**. You specify which of those two fields is used to match donors being imported to existing donors in your database, with an option in Section 4 of the window, which is described below.

You also must import at least the Date Received, Total Amount and Donation Category fields, which are the minimum required fields for donations.

DONATION can actually store several additional fields about Gifts in Kind for Canadian users, particularly [appraiser](#) information. Since gifts in kind are generally one-off situations (particularly ones that require appraisal) we do not see a reason that you would want to import them rather than entering them normally in the program, so those appraiser fields cannot be imported.

### **Figuring out which Columns of your File to Import into which Donor and Donation Fields**

Ultimately it is your responsibility to analyze the data in the file you want to import, and correctly associate it with the desired Fields to Import, in the correct order. Most errors you make as you try to get this to work will be identified by error messages, or visible when you are shown the data to be imported later in the process.

If you absolutely cannot figure this out yourself and need assistance, we can help, but potentially complex work like that would **not** be part of our normal paid support expectations. It would be charged, after getting your agreement of course, at our normal hourly rate.

### **Skipping Columns**

The "Skip Column(s)" field from the Donor and Donation Fields list is of course not really a donor or donation field. Adding it will prompt you for a number of columns in the input file to skip. An entry such as "Skip 1 Column" or "Skip *N* Columns" (where *N* is a number) will then appear in Fields to Import list at the right, based on what you entered. Where you position it in that list with the **Move Up** or **Move Down** buttons (or drag and drop) will determine where extra columns are expected to occur, that should be ignored when importing.

If there are extra columns at the end of the lines in the import file that you do not need to import, you don't actually have to add a "Skip Column(s)" for that. Instead, when you do the import, you will be informed that there are more columns in the import file than you have specified to be imported, and asked to confirm that you are OK with that. If you confirm that, the import will proceed, ignoring those columns at the end. However, if you want to avoid that question, you certainly **can** add an appropriate "Skip Column(s)" at the end of your Fields to Import list to account for all of the fields to be ignored at the end of each line.

### **Sections 2 and 3**

In section 2, you specify the name of the Import File that is to be imported. You can either just type it in (include the full path – drive and directory), or use the **Browse** button to bring up a standard File Open dialog box to find the file. It can be a tab-separated text file (\*.txt), either type of Excel file (\*.xls or the newer version, \*.xlsx), or a comma-separated value file (\*.csv).

If you select an Excel file to import, DONATION will have Excel invisibly save it to a comma-separated value (CSV) file (described below), and then actually import that CSV file.

A tab-separated text file is a plain-text file where each donor and donation is on its own line, and each field on the line (even optional fields that have no data for the current donor or donation) is separated by one tab character. Fields may optionally be enclosed in quotation marks, but that is not necessary. The file may optionally have one or two rows of column



headers at the top. If you currently have the data in a spreadsheet program such as Excel, you can easily export it to tab-separated text with the **File** ⇒ **Save As** menu option, using the Save as type "Text (Tab Delimited)" or "Unicode Text" if your data might include accented characters, or characters that are not part of the English alphabet.

A comma-separated value (CSV) file is somewhat similar to a tab-separated text file, but a comma rather than a tab separates the fields on each line, and fields containing commas (or double quotes) are enclosed in double quotes. If you currently have the data in a spreadsheet program such as Excel, you can easily export it to CSV with the **File** ⇒ **Save As** menu option, using the Save as type "CSV (comma delimited)" or "CSV UTF8 (comma delimited)" if your data might include accented characters, or characters that are not part of the English alphabet. If you specify to import an Excel file, DONATION will actually do that save to CSV for you, and then import the CSV file.

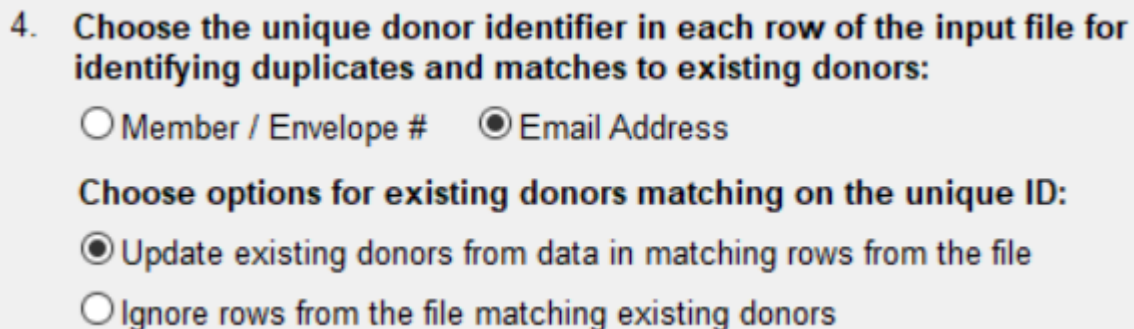
Other spreadsheet programs (like OpenOffice Calc) may only have options to save files as CSV - that works too, although you will have to do that saving manually. DONATION cannot do that conversion for you if you do not have Excel installed.

When you use the **Browse** button, it will start out showing only one type of file, "Microsoft Excel Documents". If you need to import a different type (tab-separated text, or comma-separated value), you can change that by dropping down the file type control near the bottom right of that window.

In section 3, you can specify how many lines of column headers are at the top of the import file. Most commonly this should be set to 0 (if there are no column headers in the file) or 1 (if there is one line of column headers in the file).

#### **Section 4 Options**

This section looks as follows, as a reminder:



4. Choose the unique donor identifier in each row of the input file for identifying duplicates and matches to existing donors:

☐ Member / Envelope #    ☒ Email Address

Choose options for existing donors matching on the unique ID:

☒ Update existing donors from data in matching rows from the file

☐ Ignore rows from the file matching existing donors

The example above is the initial default, which is to use the Email Address as the donor identifier, and updated existing donors from data in the import file. That is likely to be the right choice for many import files that contain both donor and donation information on each line.

If you know that your input file contains a number field matching Member / Envelope Numbers of existing donors in your program, rather than an email address field matching them, you can select the radio button for that field on the first row here.

If you are using the Email Address as the unique ID, you will need to make sure that any email addresses in the import file, that are for donors already in your Donor List in DONATION, are

actually recorded as that donor's email address in the program. (Otherwise, they will be added as new donors, causing duplication!) Of course, the same applies to Member / Envelope Numbers, if you use that as the unique ID.

The next two radio buttons determine what happens if an input line contains a value of that unique ID matching an existing donor in the current year's Donor List. Here is what each of those options means:

- **Update existing donors from data in matching rows from the file:** With this option, for rows to be imported that match existing donors in the Donor List on your selected unique ID field (Member/Envelope # or Email Address), filled-in field data in the import file will update (overwrite) your existing donor data. Use this option if you believe that the data in the import file is likely to be more correct (or at least as correct!) as your existing data in the Donor List. Entirely empty fields in the input will not overwrite existing data. See also under [Special Processing for Empty Fields when Updating](#) below, though, for a way to force input values to clear existing donor field data.
- **Ignore rows from the file matching existing donors:** With this option, rows in the import file that match existing donors in the Donor List on your selected unique ID field (Member/Envelope # or Email Address) will not update the existing donor data. Use this option if you believe that your existing data in the Donor List is more likely to be correct than whatever data you are importing. **The donor information on such rows will still import!**

With either of those radio button options, any donors in the import file that do not match existing donors in your Donor List on the unique ID will be added to the Donor List.

**Note:** If you use **Database = Import = Donors** menu option separately, it has another radio button option for this matching, **Add all rows from the file as new donors**. That seems very unlikely to be the right action for imports of donors and donations together, so it is not an option on this window.

One combination to be aware of is if you pick the Email Address as the Unique ID field, and select **Update existing donors from data in matching rows from the file**. In that case, if you have two or more existing donors with the same email address as a row in the input file, that will be an error and the import will not be able to proceed. That's because the program cannot know which of the existing donors it should be updating, or recording donations for! Most commonly this would be a problem if you have spouses recorded as separate donors, and they share an email address. One solution to this would be to merge them into one donor (since at least in Canada and the U.S.A. they can share each other's tax receipts anyways!), with the **Database = Merge Duplicate Donors** [menu option](#).

The same donor (as identified by the unique ID) may of course appear on multiple rows of the input file, if they have made multiple donations. In that case, you would not want to attempt to import or update that donor more than once! So, only the first row in the input file with a given value of your selected unique ID field will be imported or updated. The donor information on all further rows with the same unique ID field will be ignored for import purposes, as if they were not there, but the donation information on those rows will still be imported.

### **Section 5 Options**

The options in section 5 determine what is imported into the Cheque # / Paid By field. If you have selected that as one of the Fields to Import in section 1, the **From Imported Field** radio

button in this section will be selected, and no other radio button options here will be allowed. If you do **not** select that field as one of the Fields to Import, you have three other fairly self-explanatory options:

- **Empty**: don't put anything into that field
- **"Pre-Receipted"**: put exactly that value into the field, which will cause the imported donations to never be included in official receipts. (See [Non Receiptable Donors and Donations](#) for details.) This would be used for importing from any 3rd party service that sends out the official receipts itself, such as CanadaHelps.org.
- **Specified Value**: If you check this, you have to enter your desired value in the entry field following it, and that value will be put into the Cheque # / Paid By field for all donations you import.

### **Special Processing for Empty Fields when Updating**

There's a problem if you are updating existing donors, in distinguishing whether an empty field means you just aren't updating whatever is already in the Donor Details for that field, or whether it means you want to clear the contents of that field.

To allow you to distinguish between those two cases, we came up with a trick:

- An input donor field that is actually empty will never replace an existing value in a matched donor being updated. The existing value will still be there after the import.
- An input donor field that contains exactly the value "empty", without the quotes, will cause that field in the matched donor to be cleared.

For donors being added, rather than updated, either an empty field or the value "empty" in the field will cause the resulting imported field to be empty.

**Note:** We considered using the more commonly used value "n/a" instead of "empty" for this trick, but the problem with that would be that you would then have no way to import the actual value "n/a" into a field, which you might want! We can't really imagine that anyone would want to import the actual value "empty" into a field.

Since donations in the import file are always added (imports cannot update existing donations!) these issues do not apply to donation fields, and there is no special processing as there is for donor fields.

### **Doing the Import**

Once you have entered your desired choices for sections 1 to 5, click the **Import** button. The first thing that will happen is that it will read the import file, and look for problems in it. If there are any problems that are fixable, it will tell you that fact, and display the list of problems in a window. You should print that list off for later fixing, then close that window. An example of such a problem is a field that is too long for the field lengths in DONATION. If the problem is not fixable in an obvious way (for example an Amount that does not appear to be numeric), it may just give you a message about it and stop the importing process.

This is actually done twice, once for the donors to be imported, and once for the donations to be imported. So if there are fixable problems that have been displayed to you for the donors, and you agree to continue with the import, you may have another file displayed to you of any problems with the donations.

Entirely blank lines in the input file will be skipped. They are not treated as errors.

The Fields to Import, Import File and the choices you made in the other sections of this window are saved when you click **Import**, and restored on any future visit to this window, so if you have used it with different options before, you may see different settings than the ones above when you open it again.

There is also an option to load and save named sets of settings, which is useful if you have to regularly import files from different sources, with different sets of fields in them. See [below](#) for details.

### **New Donation Categories**

If there are Donation Category values in the import file that have not been imported before, and do not match any category descriptions that you already have in DONATION, a window for dealing with that will be displayed. It allows you to associate the new ones with existing donation categories, or create your desired shorter forms (maximum 20 characters) for new categories.

See [Importing New Categories](#) for full details.

**Note:** If you are importing the Donor Category 1 or 2 fields, this type of approach is not taken - any new values are automatically added to the list of available options for those Donor Categories in the program.

### **Handling Errors and Warnings and Continuing**

If there are unfixable problems on the first data line (after any column header lines) they will be shown to you immediately, rather than analyzing the rest of the input file first, because it probably indicates that your settings in this window are incorrect - wrong number of columns, columns in the wrong order, etc.

However, if there are more columns on the first data line of the input file than you have specified in the Fields to Import, you will be given an option to import the file anyways, ignoring the extra columns. All rows of the file must have the same number of columns as every other row!

That file displayed to you in the window clearly separates out unfixable problems (like missing required fields) from ones that it will try to fix for you (like overly long names). If there were unfixable problems, you will have to go back to the original file being imported, make the appropriate fixes, and then try the import again.

The data to be imported will now be displayed for you, if there were no unfixable problems. It is displayed in a two-part window, with the donor details to be imported on the top, and the donation details on the bottom.

Take a good look at the displayed data in both sections. Make sure the right data is shown with the right fields, and that any rows of headers from your data are not displayed. (Note: the program will have put in its own headers, so what you are checking is that you don't seem to have two or more rows of headers.) Also check that all of the donors and donations you expected to be displayed are in fact displayed. Finally, you can check the count and dollar

total of the donations in the summary at the end of the list. If everything looks fine, click **Import** in the window displaying the data to be imported, and the import will begin. If there are problems with what you see in the data preview window, click **Cancel** and the Import will not be done.

As the data is being imported, progress will be showing in the bar at the bottom of the window.

Note that in both parts of the preview window, there are columns for the all importable donor and donation columns, whether or not you are importing those fields or displaying them on the program's main window. If you aren't importing one of those fields, the values in that column will just be empty, except for donors if you are updating existing donors and the existing donor in the database had values in that field.

After you click **Import** in the preview window, it will perform the import. When it is done, it will tell you so, then close the Import window.

If fixable errors were shown in the window and you printed them off, you should now go back in the DONATION program's main window to each donor and donation that had an error displayed in that printout, and decide how or whether you wish to fix it in the imported record.

### **Possible Problems with Complaints about Numbers of Rows or Columns**

Sometimes the program will complain that you are only supposed to be importing some number of columns, but some rows have more columns. But when you look at the Excel file, you only see data in the expected number of columns.

Or, it may complain that there are rows with missing data, and the row numbers it mentions appear to be empty and are below the bottom of your data.

In either case, a simple solution is to just copy the rows and columns that do have data in them out of this Excel file, and paste them into another file. Then import that other file instead!

### **Loading and Saving Settings**

As mentioned above, when you click **Import**, your settings in this window are automatically saved, and automatically restored the next time this window is opened.

However, some users may need to regularly import donors and donations from more than one external source, where the files have different fields in them, in different orders. The **Load Settings** and **Save Settings** allow you to save and re-load your settings for multiple import files.

Once you have your settings set up as desired for one import file, click **Save Settings** to save them. You will be prompted for a name to save them with. If you were for instance using this for importing donations exported from PayPal, you might use "PayPal" as that name.

Then when you return to this window in the future, if you most recently used other settings, those settings will be shown. In that case, you can click **Load Settings** to re-load any settings you saved and named before. If there is more than one saved set of named settings, you will be prompted with a list, so you can choose which one to load. That list also has a **Delete** button that allows you to delete a previously saved set of named settings.

If you have either loaded or saved settings during one use of this window, and then you do an **Import**, your current settings will, as always, be automatically saved, and then automatically loaded the next time this window is opened. In addition, if you have changed the settings at all since the load or save, you will be prompted as to whether you also wish to re-save them to the last named settings that you loaded or saved.

### **Examples**

There are separate Help pages with worked-out examples for the following:

- [Importing Donors and Donations from CanadaHelps](#)
- [Importing Donors and Donations from PayPal](#)
- [Importing Donors and Donations from Easy Tithe](#)
- [Importing Donors and Donations from QuickBooks](#) (These ones actually have to be imported as donors and donations separately.)

Please note that those pages do **not** repeat the full instructions from this page. They only tell you the specifics of the features from this window that you use in those cases.

## **5.21 Importing Donors and Donations from CanadaHelps**

If you use the CanadaHelps service to accept online donations, they have an option to export data files for importing into other programs.

You can import that one file with the **Database** ⇒ **Import** ⇒ **Donors and Donations** [menu option](#), in order to import both donors and donations that are included on the same lines of the file.

**Please first read the Help topic [Importing Donors and Donations from One File](#) to understand the general issues about doing this type of activity.** What follows are the specifics for CanadaHelps. This page will **not** repeat the details from that overall instruction page.

Here is a table of some sample data exported from CanadaHelps as of mid-2020, using its default export columns. ***Please note that they could change the list of fields at any time, and then you would have to adjust the details below!***

We have actually turned the data sideways to make it understandable (and fit on a page!). So if this was in Excel, the rows would be columns and vice-versa. We added a first column to the table below to count the field numbers. What I have listed as Field 1 is really Column A in Excel, Field 2 is Column B, etc. The 2nd column of the table below is the row of headings from the data, and the 3rd column is a made-up sample data row.

<b>Field #</b>	<b>Heading</b>	<b>Data</b>
1	TRANSACTION NUMBER	TRxxxxx
2	PAYMENT METHOD	Credit Card
3	RECEIPT #	
4	DONOR TITLE	Ms.

5	DONOR FIRST NAME	Anne
6	DONOR LAST NAME	Andrews
7	DONOR COMPANY NAME	
8	DONOR ADDRESS 1	1 Main St.
9	DONOR ADDRESS 2	
10	DONOR CITY	Toronto
11	DONOR PROVINCE/STATE	ON
12	DONOR POSTAL/ZIP CODE	M1M 1M1
13	DONOR COUNTRY	CA
14	DONOR PHONE NUMBER	
15	DONOR EMAIL ADDRESS	<a href="mailto:anne.andrews@mailservice.com">anne.andrews@mailservice.com</a>
16	DONOR EMAIL OPT IN	N/A
17	DONOR LANGUAGE	ENGLISH
18	CHARITY LEGAL NAME	MY CHARITY
19	CHARITY BN#	12345...
20	FUND DESIGNATION	E- General
21	AMOUNT	20
22	RECEIPTABLE AMOUNT	20
23	DONATION DATE	01/01/2020
24	DONATION TIME	5:59 AM
25	FEE	0.7
26	DISBURSEMENT STATUS	Disbursement confirmed
27	TOTAL DISBURSED	19.3
28	IN HONOUR OF	FALSE
29	HONOUREE	
30	IN MEMORY OF	FALSE
31	ECARD SENT	NO
32	CARD REQUESTED	FALSE
33	CARD NAME	
34	CARD ADDRESS 1	
35	CARD CITY	
36	CARD PROVINCE/STATE	
37	CARD COUNTRY	
38	CARD POSTAL/ZIP CODE	
39	CARD ADDRESS 2	
40	CARD SIGNED AS	
41	CARD SPECIAL MESSAGE	
42	MESSAGE TO CHARITY	

There are more columns beyond that, but we do not currently see a use for them in this importing.



Based on this, the following list of columns would be selected in the Fields to Import list of the **Database ⇒ Import ⇒ Donors and Donations** window:

- Skip 3 Columns
- Title
- First Name
- Last Name
- Business Name

*Note: in our examination of the data, this often showed up as the first name plus the last name, so it might be better to use Skip 1 Column here!*

- Addr1
- Addr2
- Addr3 (Merge 2 Fields)

*This merges the DONOR CITY and DONOR PROVINCE/STATE fields into one field.*

- Postal Code
- Skip 1 Column
- Phone
- Email
- Skip 4 Columns
- Category
- Total Amount
- Eligible Amount
- Date Received
- Skip 18 Columns
- Description

The rest of the columns are irrelevant, so we will ignore them. When importing donors and donations, if there are extra columns at the end of each row you will be warned about that, but given an option to just ignore them, so we don't need to have a big "Skip ... Columns" at the end to skip them.

Import that possibly edited file now, with the following other settings:

- 1 header row
- **Email Address** as the unique identifier for donors
- either **Update existing donors from data in matching rows from the file** or **Ignore rows from the file matching existing donors** (whichever you prefer)
- In Section 5, choose **Pre-Receipted**.

The reason for that last selection is that CanadaHelps.org issues tax receipts itself. So we need "Pre-Receipted" to be entered into the Cheque # / Paid By field, to ensure that we don't send a receipt too for these donations.

**Warning:** CanadaHelps allows anonymous donations. In that case, "ANON" will be put into many of the fields, including the EMAIL field. Since that is not a valid email address, it will cause the file to be rejected, with an appropriate error displayed. To fix that, you will have to load the file into Excel, find any instances of "ANON" in the EMAIL field (Column O in the current version of that file), and change it to something importable into a new anonymous donor

record, perhaps "anon@anon.com". You will also want to find that donor record after it is imported the first time, and set it to be [non-receiptable](#).

### Saving the Settings

You can repeat these imports each time you download a new file from CanadaHelps, using the same settings, which the program remembers for you unless you do other different imports with this window in between, that get memorized in place of these settings. To be sure you can get back to these settings, we recommend using the **Save Settings** button and saving them with the name "CanadaHelps", without the quotes. Then if you have used this same window for some different importing, you can get back to these PayPal settings with the **Load Setting** button.

## 5.22 Importing Donors and Donations from PayPal

If you use PayPal to accept online donations, they have an option to export data files for importing into other programs, called the Activity Download.

In their current website (as of September 2020), after logging into your account, you get to that by clicking on Activity at the top, then the Download link at the top right above the displayed activity. Then you can select your desired options there, including the Date Range and the Format. (Choose CSV or Tab for the format.) After then clicking Create Report, PayPal will begin creating it, and show it when it is ready. (They will also email you when it is ready - sometimes it can take a little while.)

You can import that one file with the **Database** ⇒ **Import** ⇒ **Donors and Donations** [menu option](#), in order to import both donors and donations that are included on the same lines of the file.

**Please first read the Help topic [Importing Donors and Donations from One File](#) to understand the general issues about doing this type of activity.** What follows are the specifics for PayPal. This page will **not** repeat the details from that overall instruction page.

Importing from a PayPal Activity Download does have some difficulties and some limitations, as explained in the details below.

Here is a table of a sample Activity Download exported from PayPal, using its default export columns.

We have actually turned the data sideways to make it understandable (and fit on a page!). So if this was in Excel, the rows would be columns and vice-versa. We added a first column to the table below to count the field numbers. What I have listed as Field 1 is really Column A in Excel, Field 2 is Column B, etc. The 2nd column of the table below is the row of headings from the data, and the 3rd column is a made-up sample data row.

Field #	Heading	Data
1	Date	01/05/2020
2	Time	8:45:57
3	TimeZone	EDT

4	Name	JOHN SMITH
5	Type	Subscription Payment
6	Status	Completed
7	Currency	CAD
8	Gross	10
9	Fee	-0.59
10	Net	9.41
11	From Email Address	<a href="mailto:johnsmith149375@gmail.com">johnsmith149375@gmail.com</a>
12	To Email Address	<a href="mailto:yourorganization@gmail.com">yourorganization@gmail.com</a>
13	Transaction ID	...
14	Shipping Address	
15	Address Status	Non-Confirmed
16	Item Title	Your Organization Subscription
17	Item ID	
18	Shipping and Handling Amount	0
19	Insurance Amount	
20	Sales Tax	0
21	Option 1 Name	
22	Option 1 Value	
23	Option 2 Name	
24	Option 2 Value	
25	Reference Txn ID	...
26	Invoice Number	
27	Custom Number	
28	Quantity	1
29	Receipt ID	
30	Balance	37.64
31	Address Line 1	
32	Address Line 2 ...	
33	Town/City	
34	State/Province ...	
35	Zip/Postal Code	
36	Country	
37	Contact Phone Number	1234567890
38	Subject	Your Organization Subscription
39	Note	
40	Country Code	
41	Balance Impact	Credit

### Importing Donors and Donations

Based on the fields above, the following list of columns could be selected in the Fields to Import list of the **Database ⇒ Import ⇒ Donors and Donations** window:

- Date Received
- Skip 2 Columns
- Name: First Last
- Skip 3 Columns
- Total Amount
- Skip 2 Columns
- Email
- Skip 4 Columns
- Donation Category
- Skip 14 Columns
- Addr1
- Addr2
- Addr3 (Merge 2 Fields)

*This merges the Town/City and State/Province ... fields into one field.*

- Postal Code
- Skip 1 Column
- Phone

The rest of the columns are irrelevant, so we will ignore them. When importing donors and donations, if there are extra columns at the end of each row you will be warned about that, but given an option to just ignore them, so we don't need to have a big "Skip ... Columns" at the end to skip them.

#### Problems with the PayPal Activity Download for Importing

There are several possible problem with the data, however, that you may have to fix before importing it.

First, if you have any PayPal transactions in the downloaded file that are anything other than donations you received, they may have nothing in the Name field that we are importing, and even if they did, you would not want to import those rows! And DONATION will not import rows with no Name value(s) filled in. So you really need to open the downloaded file in Excel, delete any rows that aren't for donations (and/or that don't have a Name), and re-save the file.

The next problem we encountered is that at least in Canada, the PayPal exports used the DD/MM/YYYY format for the date, while our test computer was using MM/DD/YYYY. To get those dates to import properly, we had to temporarily change the Short Date format in Regional settings in Control Panel to match the PayPal format - DD/MM/YYYY. Otherwise a date in the PayPal file like 01/05/2020 (for May 1) would be imported into DONATION as January 5!

We chose PayPal's Item Title field to import into the Donation Category. You will be prompted when values in that column don't exist as Donation Categories. You can associate them with existing categories, or create new Donation Categories based on them. For this sample, we associated the value that was always found in the Item Title field, which was "Your Organization Subscription", to the General category. This also points out a weakness of using PayPal for donations: it doesn't seem that there's any way for your donors to specify a donation category and have that come out in the import file. So all PayPal donations that you import may end up getting the same Donation Category, unless you can figure something else out that you can use in the data to distinguish categories.

### Doing the Import

Import that possibly edited file now, with the following other settings:

- 1 header row
- **Email Address** as the unique identifier for donors
- either **Update existing donors from data in matching rows from the file** or **Ignore rows from the file matching existing donors** (whichever you prefer)
- In Section 5, choose **Specified Value** and enter the value "PayPal", without the quotes.

One concern you might have about choosing **Update existing donors ...** with the field selections above is that the exported phone number format is just 10 digits with no dashes or other punctuation. Fortunately the import routine will reformat a number like 1234567890 to (123) 456-7890, so that should not cause a problem.

### Saving the Settings

You can repeat these imports each time you download a new file from PayPal, using the same settings, which the program remembers for you unless you do other different imports in this same window in between, that get memorized in place of these settings. To be sure you can get back to these settings, we recommend using the **Save Settings** button and saving them with the name "PayPal", without the quotes. Then if you have used this same window for some different importing, you can get back to these PayPal settings with the **Load Setting** button.

## 5.23 PayPal Direct Import

**This feature is not completed! This is only preliminary information for some volunteer users who are doing some advance testing of it.**

### Initial Setup to get PayPal Credentials

Before you can import donations directly from your organization's PayPal account into DONATION, you will need to obtain some required credentials for that from PayPal, and insert them into DONATION. As of early 2022, the following is the process to do that. This may only be available for PayPal Business accounts, not Personal accounts.

First, log in to your PayPal account in your web browser. Click on **Developer** in the blue bar at the top, near the right side. If you do not see that, you can instead try logging in directly on <https://developer.paypal.com/>.

On the window that comes up, hover over your name at the top right in the blue bar and select **Dashboard** from the drop-down menu.

Under the heading My Apps and Credentials, click on **Live**. (That will cause Live to have a dark blue background.)

Click the blue **Create App** button under that. That will bring you to a page prompting for the App Name - enter Software4Nonprofits, or if you prefer, use your organization's name. Then click the **Create App** button on this window.

On the window that comes up, click on the displayed Client ID to highlight it, then right-click on it, and pick **Copy** from the popup menu. You will need that value later in DONATION, so please record it (as your PayPal Client ID) in a Word document or somewhere you will be able to find it again.

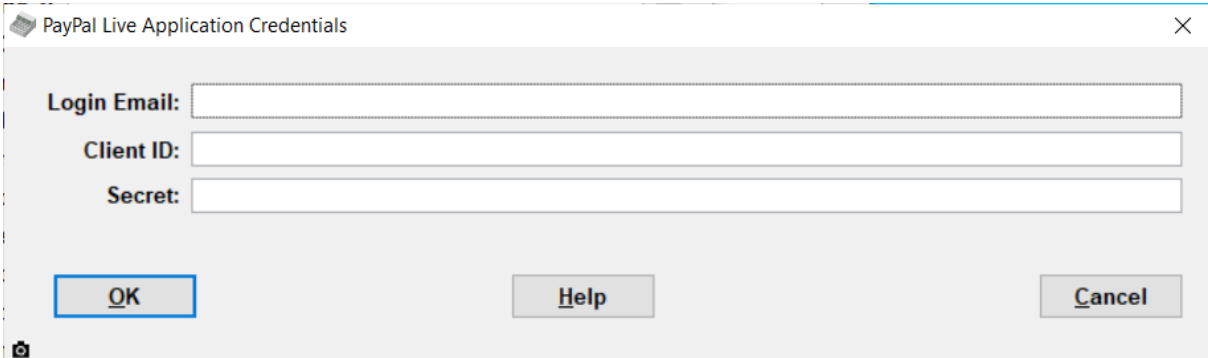
Then below that under the heading Secret, click **Show**. Click anywhere in the displayed Secret value (under the heading "Secret") to highlight it, then right-click on it, and pick **Copy** from the popup menu. You will need that value later in DONATION, so please also record it (as your PayPal Secret) in a Word document or somewhere you will be able to find it again.

Scroll down on the same page to the section headed Live App Settings. Uncheck all of the checkboxes that are checked (you do not want to give those permissions to DONATION), except be sure that the last checkbox, for Transaction Search, is checked (that is all that DONATION will use). Click **Save**. A window will come up saying "You are about to turn off a capability in your app". Click **Continue** on that window.

### **Testing Retrieving PayPal Transactions and Sending them to Software4Nonprofits.com for Analysis**

During this testing and development phase, we need to analyze downloaded PayPal transactions from a number of users to figure out a consistent approach to interpreting and importing the data into DONATION. For now, all the program does is allow you to enter the credentials you obtained in the previous section, download your PayPal transactions from December 2021, and optionally email them to us for analysis.

To start this process, use the **Database ⇒ Import ⇒ PayPal Donations** menu option. If you have not entered your credentials on a previous use of that menu option, it will first come up with this window to enter your credentials:

The image shows a screenshot of a software dialog box titled "PayPal Live Application Credentials". The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner. Inside the dialog, there are three text input fields stacked vertically. The first field is labeled "Login Email:", the second is labeled "Client ID:", and the third is labeled "Secret:". Below these fields, there are three buttons: "OK" on the left, "Help" in the center, and "Cancel" on the right. The "OK" button is highlighted with a blue border. The dialog box is set against a light gray background.

Enter your PayPal email address and the credentials you determined by following the instructions in the previous section, then click **OK**. After confirming that those credentials work, your settings will be saved.

After that, the program will inform you of what it is doing: first retrieving all of your December 2021 transactions from PayPal, then offering to email a text file containing them to us as an attachment.

Assuming you do email that file to us, we will analyze it and get back to you with any questions that might help with our development of a feature to import PayPal transactions into DONATION (and also into our ACCOUNTS bookkeeping program).

Thank you for your assistance!

## 5.24 Importing Donors and Donations from Easy Tithe

If you use Easy Tithe to accept online donations, they have an option to export data files for importing specifically into DONATION.

To get that import, select Settings (the gear icon), then Data Export, then select Software4Nonprofits in the drop-down list of Export Profiles. Set your desired Start Date and End Date, then click **Export Data**. That will download the exported donations to a file that you specify.

You can import that file with the **Database ⇒ Import ⇒ Donors and Donations** [menu option](#), in order to import both donors and donations that are included on the same lines of the file.

**Please first read the Help topic [Importing Donors and Donations from One File](#) to understand the general issues about doing this type of activity.** What follows are the specifics for Easy Tithe. This page will **not** repeat the details from that overall instruction page.

Importing from a Easy Tithe Activity Download does have some potential issues, as explained in the details below.

Here is a table of a sample Software4Nonprofits export from Easy Tithe.

We have actually turned the data sideways to make it understandable (and fit on a page!). So if this was in Excel, the rows would be columns and vice-versa. We added a first column to the table below to count the field numbers. What I have listed as Field 1 is really Column A in Excel, Field 2 is Column B, etc. The 2nd column of the table below is the row of headings from the data, and the 3rd column is a made-up sample data row.

Field #	Heading	Data
1	First Name	Mary
2	Last Name	Smith
3	Address	10 Main St.
4	Address Line 2	
5	City	Toronto
6	State	ON
7	Zip	M1M 1P1
8	Email	you@youraddress.com
9	Phone	416-555-1234
10	Amount	10.00
11	Date of Transaction	10/31/2020
12	Fund Name	General Donation



13	Notes/Comments	Recurring
14	Envelope Number	
15	Transaction Type	Online

### Importing Donors and Donations

Based on the fields above, the following list of columns could be selected in the Fields to Import list of the **Database = Import = Donors and Donations** window:

- First Name
- Last Name
- Addr1
- Addr2
- Addr3 (Merge 2 Fields)
- Postal Code
- Email
- Phone
- Total Amount
- Date Received
- Donation Category
- Description
- Member/Env. #
- Skip 1 Column

The Transaction Type column is irrelevant, so we skip it.

### Issues with the Easy Tithe Download for Importing

There are a few possible issues with the data, however, that you need to be aware of.

First, refunds with negative dollar amounts could be included in the Easy Tithe transactions in the downloaded file. If that is the case, during the import you will be given an option of whether to ignore negative amounts. If you answer Yes to ignore them, the transactions with negative amounts will be shown to you after you complete the import, so that you can deal with them later. If you answer No, to not ignore them, the import will be cancelled.

The most sensible way to deal with refunds in DONATION is to answer Yes to that question. Then when you are finished doing the import, find the original recorded Easy Tithe donations for each refund and delete them. If that donation has already been part of a receipt, though, you will have to create and send out a [corrected receipt](#). (The program will tell you that when you delete it.)

The other issue is that the Easy Tithe exports use the MM/DD/YYYY format for the date. If that does not match the short date format you are using on your computer (at least in terms of the order of the month, day and year components) the dates will not import correctly. To get those dates to import properly, you would change the Short Date format in Regional settings in Control Panel to match the Easy Tithe format - MM/DD/YYYY. Otherwise a date in the Easy Tithe file like 05/01/2020 (for May 1) would be imported into DONATION as January 5 if your short date format was DD/MM/YYYY! See [Dates in DONATION](#) for details on making changes.

### Doing the Import

Import that possibly edited file now, with the following other settings:

- 1 header row
- **Email Address** as the unique identifier for donors
- either **Update existing donors from data in matching rows from the file** or **Ignore rows from the file matching existing donors** (whichever you prefer)
- In Section 5, choose **Specified Value** and enter the value "Easy Tithe", without the quotes.

One concern you might have about choosing **Update existing donors ...** with the field selections above is that the exported phone number format is just 10 digits with no dashes or other punctuation. Fortunately the import routine will reformat a number like 1234567890 to (123) 456-7890, so that should not cause a problem.

### Saving the Settings

You can repeat these imports each time you download a new file from Easy Tithe, using the same settings, which the program remembers for you unless you do other different imports in this same window in between, that get memorized in place of these settings. To be sure you can get back to these settings, we recommend using the **Save Settings** button and saving them with the name "Easy Tithe", without the quotes. Then if you have used this same window for some different importing, you can get back to these Easy Tithe settings with the **Load Setting** button.

## 5.25 Importing Donors and Donations from QuickBooks

Sometimes users who start using DONATION have previously been using QuickBooks to record their individual donors and donation details. Such users may wish to export that data from QuickBooks and import it into DONATION. As you will see from the details below, it is possible to import the donors, but it may not be possible to import the donations.

Once you have done that, whatever overall accounting program you continue to use (whether or not it is QuickBooks), you will no longer enter details of donors and donations into it. Instead, we recommend recording only summary totals from each bank deposit into your accounting program, by using the DONATION program's [Bank Deposits](#) feature.

### QuickBooks Desktop Pro 2020

This section applies to QuickBooks Desktop Pro 2020. Likely the details are the same or very similar in other Desktop versions, but you will of course have to check that out for yourself. See [below](#) for a section on QuickBooks Online.

Most likely you have recorded your donors as Customers. In some editions you may have had an option to rename Customers to Donors, but likely the details are still the same as will be described here. If you are going to try to also import the donations (see [below](#)) it will be crucial that each Customer / donor has their email address recorded.

To export the Customers from QuickBooks Desktop Pro 2020, go to the Customers area, and pick **Excel ⇒ Export Customer List** from its menu. Likely you will leave the default options on

the window that comes up as is, then click **Export**. That will bring up the exported list of customers in Excel. Save that file somewhere you can find it.

Here is a table of a sample exported customer list from QuickBooks Desktop Pro 2020.

We have actually turned the data sideways to make it understandable (and fit on a page!). So if this was in Excel, the rows would be columns and vice-versa. We added a first column to the table below to count the field numbers. What is listed as Field 1 is really Column A in Excel, Field 2 is Column B, etc. The 2nd column of the table below is the row of headings from the data, and the 3rd column is a made-up sample data row.

Field #	Heading	Data
1	<i>none</i>	
2	Active Status	Active
3	Customer	John Smith
4	Balance	0.00
5	Balance Total	0.00
6	Company	Smith Incorporated
7	Mr./Mrs....	Mr.
8	First Name	John
9	M.I. (middle initial)	Q.
10	Last Name	Smith
11	Primary Contact	John
12	Main Phone	123-456-7890
13	Fax	
14	Alt Phone	
15	Secondary Contact	
16	Job Title	
17	Main Email	<a href="mailto:johnsmith@gmail.com">johnsmith@gmail.com</a>
18	Invoice To 1	John Smith
19	Invoice To 2	123 Main St.
20	Invoice To 3	Suite 100
21	Invoice To 4	Anytown ON M1M 1M1
22	...	

There are a bunch of further columns that do not seem relevant.

You can import that file described above, from QuickBooks Desktop Pro 2020, with DONATION's **Database** ⇒ **Import** ⇒ **Donors** [menu option](#).

**Please first read the Help topic [Importing Donors from Excel](#) first to understand the general issues about doing this type of import.** What follows are the specifics for this QuickBooks data. This page will **not** repeat the details from that overall instruction page.

#### Importing the Donors

Based on the data above, the following list of columns could be selected in the Fields to Import list of the **Database ⇒ Import ⇒ Donors** window:

- Skip 5 Columns
- Business Name
- Title
- First Name
- Middle Initial
- Last Name
- Skip 1 Column
- Phone
- Skip 4 Columns
- Email
- Skip 1 Column
- Addr1
- Addr2
- Addr3

The rest of the columns seem to be irrelevant, so we will ignore them. When importing donors, if there are extra columns at the end of each row, you will be warned about that, but given an option to just ignore them, so we don't need to have a big "Skip ... Columns" at the end to skip them.

If you have both Active and Inactive customers in QuickBooks, you may want to eliminate the rows with inactive ones before importing.

You can then import that possibly edited file, with 1 header row, using **Email Address** as the unique identifier for donors, selecting either **Update existing donors ...** or **Ignore rows ... matching donors** (whichever you prefer). In fact, since you are most likely doing this just once when you first switch from recording donors in QuickBooks to using DONATION, the **Add all rows ... as new donors** option might be the most appropriate choice.

### QuickBooks Online

We also tested the mid-2020 version of QuickBooks Online to see how it would export the data. To export Customers from it, go to Sales on the left-hand menu, then Customers. Click the icon for "Export to Excel" above the list of customers that comes up, and save the file somewhere you can find it.

The QuickBooks Online export format for Customers is different from the one used by QuickBooks Desktop. It has one significant problem: if there are two lines of address (before the City etc.), they are put into one cell in Excel (in Column C) with a line break in the cell, like this:

C
Street Address
: 101 Main Street Suite 100

To be importable into DONATION, that needs to be split out into two separate columns, with the line break removed. So we will assume that you inserted a new Column D for the 2nd line of address, and used copy and paste to pull out any 2nd lines of address that appeared like the one above into that column D. You need to also be sure that the line break gets removed from column C, by using Delete or Backspace from an appropriate place when you are editing the field.

Having done that, the following is what you will see in the data. Again, we have actually turned the data sideways to make it understandable (and fit on a page!). So if this was in Excel, the rows would be columns and vice-versa. We added a first column to the table below to count the field numbers. What is listed as Field 1 is really Column A in Excel, Field 2 is Column B, etc. The 2nd column of the table below is the row of headings from the data, and the 3rd column is a made-up sample data row.

Field #	Heading	Data
1	Customer	John Smith
2	Company	Smith Incorporated
3	Street Address	123 Any Street
4	Address 2 ( <i>added to split things out as described above</i> )	Suite 100
5	City	Toronto
6	Province/Territory ( <i>presumably this says State for U.S. users</i> )	ON
7	Country	
8	Postal Code ( <i>presumably this says Zip Code for U.S. users</i> )	M1M 1M1
9	Phone	123-456-7890
10	Email	<a href="mailto:johnsmith@gmail.com">johnsmith@gmail.com</a>
11	...	

There are a few columns after that that do not seem relevant.

You can import that file described above, from QuickBooks Online, with the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#).

Please first read the Help topic [Importing Donors from Excel](#) to understand the general issues about doing this type of import. What follows are the specifics for this QuickBooks Online data.

#### Importing the Donors Exported from QuickBooks Online

Based on the data above, the following list of columns could be selected in the Fields to Import list of the **Database** ⇒ **Import** ⇒ **Donors** window:

- Name: First Last
- Business Name
- Addr1
- Addr2

- Addr3 (Merge 2 Fields)
- Skip 1 Column
- Postal Code
- Phone
- Email

We're assuming you don't need to import the Country.

The rest of the exported columns seem to be irrelevant, so we will ignore them. When importing donors, if there are extra columns at the end of each row, you will be warned about that, but given an option to just ignore them, so we don't need to have a big "Skip ... Columns" at the end to skip them.

You can then import that file, with 1 header row, using **Email Address** as the unique identifier for donors, selecting either **Update existing donors ...** or **Ignore rows ... matching donors** (whichever you prefer). In fact, since you are most likely doing this just once when you first switch from recording donors in QuickBooks to using DONATION, the **Add all rows ... as new donors** option might be the most appropriate choice.

### **Importing the Donations**

Unfortunately it is not clear to us that this is easily possible from QuickBooks Desktop Pro or QuickBooks Online. If you can figure out a realistic way to do it, please let us know ([Contact Information](#) here)! The major difficulty is that donations can only be imported into DONATION if they can be linked to the donors by an email address or member/envelope number field value that is in the import file.

The following are some notes on the ways we have attempted to do this, none of which really worked, and the reasons why they didn't work.

We are aware of two ways of entering donations into QuickBooks Desktop Pro: as a Sales Receipt using the Customers area, or as a Deposit on the Register for the bank account you are depositing into.

If you use Sales Receipts, you seem to need to have defined Items for each income account / donation category that you receive donations on. But if you export them from that Customer area, with the QuickBooks menu option **Excel = Export Transactions**, that exporting seems to only be one customer/donor at a time, it doesn't identify the customer as part of the exported data, it's in a report format that DONATION cannot import, and it doesn't identify the Item so you can't tell what donation category it's for.

You could also go to the Register window for the bank account that donations are deposited into, and generate a Quick Report including the desired donations. However, it might be hard to filter that to include only donations.

Even if you can get only the deposit transactions for donations in that Quick Report, and you then use the **Excel** drop-down on the report to export it to a worksheet, it is again a formatted report, not really suitable for importing using the DONATION program's **Database = Import = Donations menu option**. It's grouped by names on their own rows, with no identifying email address that DONATION would need for matching the donors to the donations. The transactions are then on their own rows, under the rows for the names. If a transaction was

entered on a Register, as a single deposit transaction using Splits to determine the Customer (donor) and the Income Account being donated to, only "-SPLIT-" is exported to the file, which is not sufficient for importing.

We also experimented with Custom Reports in QuickBooks Pro. It seemed to be possible to create a Transaction Detail Custom Report that includes the "Name E-Mail" field, which would be necessary for importing, to match the donation to the donor. However, what that report does is include rows for both the debits and credits in each transaction. So for donations, there will be a line with a positive number, which should be ignored, and a line with a negative number, which is what you would want to import - after changing it to a positive number. So while you could potentially import that after saving it to Excel, it would take a lot of work to first delete the rows with positive amounts, and then convert the negative amounts to positive ones before importing.

In QuickBooks Online, if you go to the Account History for your bank account, and use the Export icon, you again get something that cannot be imported, because it doesn't include an import identifier such as the email address for the donors (only perhaps the name, as the Payee), and if it's a transaction with Splits, there is nothing in the column for the Account. QuickBooks Online doesn't have a customization option for a transaction report (like the Journal) to include the customer's email address. So there is no way to directly create an importable custom report, without for instance having to manually copy and paste email addresses into a column of an exported transaction report.

## 5.26 Importing Data from Viansoft Church Contribution System

The Viansoft Church Contribution System is a program that is no longer available - the authors of it seem to have completely disappeared. The DONATION program can import the donors, donations and donation categories from it, as long as your Viansoft program is still working.

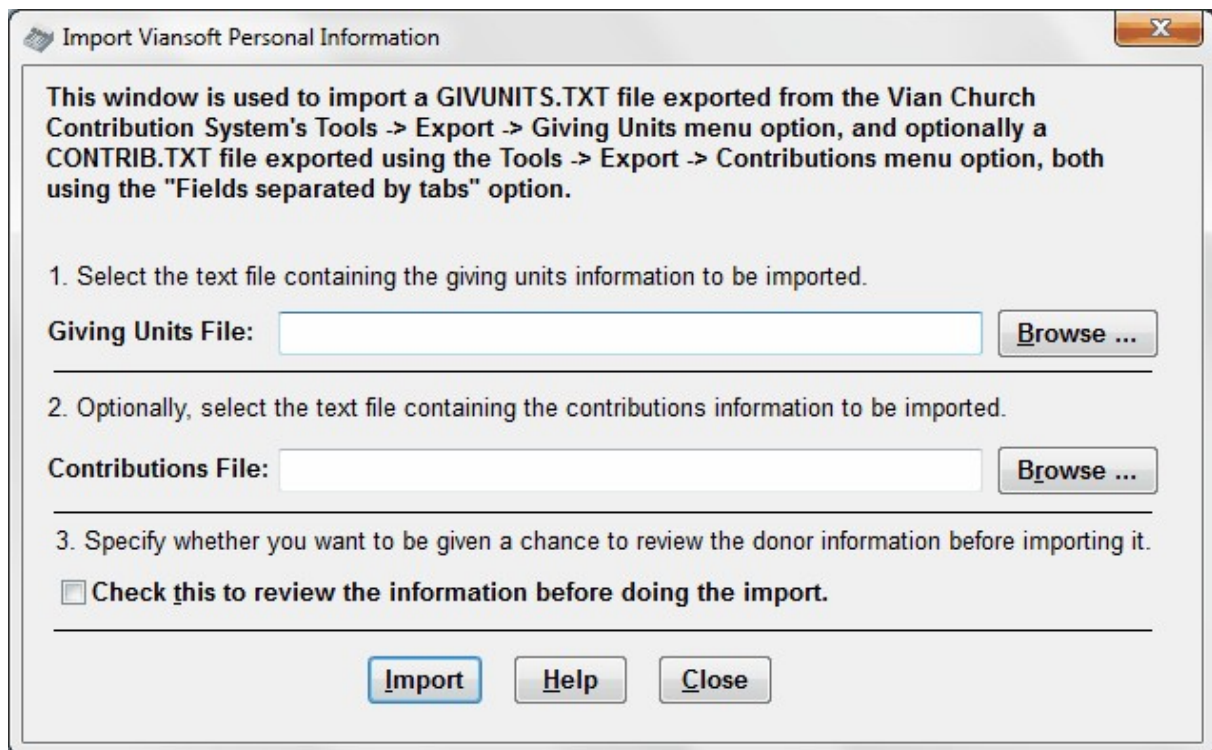
Unlike some of the other conversions available in DONATION (for example from [Membership Plus](#)), the conversion cannot be done directly from the Viansoft program's database files. The reason is that those files are encrypted, and there is no way to determine what the encryption key is that could be used to decrypt them and read them directly. So the conversion can only be done if you still have a working Viansoft Church Contribution System.

To do the conversion if you do have a working Viansoft program, run that program, and first use the menu option **Tools** ⇒ **Export** ⇒ **Giving Units**. On the window that comes up, be sure to note what directory the exported file will be saved into, and also be sure to check the radio button for the export format "Fields separated by tabs". Click **Export** to do the export. When it is done, click **Close**.

If you also want to import donations and donation categories from Viansoft, repeat those steps with the **Tools** ⇒ **Export** ⇒ **Contributions** menu option in the Viansoft program.

Then you can exit the Viansoft program, run DONATION, and use the **Database** ⇒ **Import** ⇒ **From Viansoft Church Contribution System** menu option. After a message explaining what this will do, and offering to show you this Help topic, the following window comes up:





Fill in the full path and filename for the Giving Units File, either by typing it in directly or by using the **Browse** button to the right of it. If you also want to import the Contributions file, fill that in directly as well, or again, you can use the **Browse** button to the right of it.

If you wish to review the donors and donations before they are imported, check the checkbox in section 3 of the window. (This would probably be a good idea, to make sure the conversion seems to be correct.)

Then click **Import**. If there are errors that prevent the file(s) from being imported, you will receive messages to that effect, and the import will be stopped.

Otherwise, if you checked the checkbox in section 3, you will then be shown two windows in succession, showing first the donors to be imported from the GIVUNITS.TXT giving units file, and then the donations to be imported from the CONTRIB.TXT Contributions file. Click **Import** in each of those windows to continue with the import, or **Cancel** to cancel the import.

You will then see some final messages about the success of the import, and possibly be shown a text file showing any issues that came up in the conversion, including fields that were too long for DONATION's field sizes and had to be trimmed down.

**Important:** Unlike the conversions from some other programs' data, this import only **adds** to any existing data you have in the DONATION program. Because of that, if you run this import twice, you will be creating duplicates of your donors and donations!

One other thing is imported by this routine, that is not displayed in a window even if you check the checkbox in section 3. That is Donation Categories. You can review those imported categories, after you return to DONATION's main window, with the **Maintenance** ⇒ **Donation Categories** menu option.

### Possible Errors with Dates

When the program starts importing the CONTRIB.TXT file (if you choose to import it), you may get a message like "Error importing data on row 1, column postdate, data: 1/13/2016". (Of course, the first error could be on a later row number.)

This will occur if the Short Date Format set in the Region and Language tool in your Windows Control Panel does not match the format that the Viansoft program always exports the dates in, which is M/DD/YYYY. If this is the case (most likely because your short date format is D/MM/YYYY, or something similar) you need to go into that Control Panel tool, and change the short date format to be the one that works for this import, namely something in the order M/DD/YYYY. (MM/DD/YYYY is fine too!)

Note: In different versions of windows, that Control Panel tool is called slightly different things, but it should be something like "Region and Language".

Once you save that change, re-try the import, and it should work fine. When you are done with the import, you can if you wish go back into Control Panel and change the Short Date Format back to the way you had it before. (DONATION always displays short dates in that same format.)

## 5.27 Importing all Data from Other Programs

It is possible to import Organization Info, Donors, Donations, Donation Categories, and Receipt information from other programs, for one or more years of historical data. This is done with the option **Database** ⇒ **Import** ⇒ **All Data**. However, this is fairly complicated, and very few users use this option, because there are many better importing options in DONATION, explained in the next few paragraphs.

If all you need to import is Donors, you can use the much easier and more user-friendly [Importing Donors from Excel, Text or CSV Files](#) routine. You may also be able to import Donations, if you have a Member or Envelope Number field linking the Donors and Donations in your existing data (or can add one), with the [Importing Donations or Recurring Donations](#) routine.

In addition, there are special routines for importing data from several other specific programs. See the following help topics if they seem relevant:

- [Converting Data from Membership Plus](#)
- [Converting Data from GiftWorks](#)
- [Converting Data from PowerChurch Plus](#)
- [Converting Data from Roll Call](#)
- [Converting Data from The Church Assistant](#)
- [Importing Data from Viansoft Church Contribution System](#)
- [Converting Data from Geminon](#)

It is very unlikely that any other programs would have built-in routines to export the data in exactly the format the we require it to be in for this feature.

However, some technically savvy users may be able to create the required files themselves and use this routine. Several users have already done so. If you need assistance converting from another program, feel free to [contact us](#) for advice. This is one area where if it looks like we may have to spend significant time to do the conversion, and only one organization is asking for a specific type of conversion, we would almost certainly charge a hourly fee for our time working on it, if we were willing to take the work on at all.

This routine completely replaces all existing data in your database, throwing out anything you have entered so far. Thus, it must be used right at the start of your use of the DONATION program, and is not intended for repeated use to import ongoing new data into the program

To use these routines, you need to create the following files, in your DONATION [Data Directory](#). We'll give example filenames for if you were importing data for 2019, and optionally also importing the prior year's data (for 2018).

<u>Type of</u>	<u>Filename</u>	<u>Optional Filename for 2018</u>
<u>Information for 2019</u>		
Organization Info	CONSTANT.TXT	
Donors	DONOR19.DONOR18.txt	
Donations	DONAT19.DONAT18.txt	
Donation Categories	CATEG19.CATEG18.txt	
Receipts	RECEP19.RECEP18.txt	

If you were going back as far as 1999 or earlier (which seems extremely unlikely!), you would create files called donor99.txt etc.

Each file is a tab-separated text file. A tab-separated text file is a plain-text file where each donor (or other type of record, depending on the file) is on its own line, and each field (even missing optional fields) on the line is separated by one tab character. Fields may optionally be enclosed in quotation marks, but that is not necessary. The files may not have any rows of column headers at the top – the first line must be real data. If you currently have the data in a spreadsheet program such as Excel, you can easily export it to tab-separated text with the **File** ⇒ **Save As** menu option, using the Save as type "Text (Tab Delimited)" (or words to that effect in spreadsheet programs other than Excel).

You need to be sure there are no empty lines at the end of any of the files, which can easily happen if you export from Excel. You can open the files in Notepad to check.

What follows is a description of the tab-separated columns of data to be imported from each of these files. The example file names are for if you are importing the 2019 year.

#### **CONSTANT.TXT:**

**Note: This file must have one and only one row in it.**

<u>Field</u>	<u>Max Length</u>	<u>Required</u>	<u>Description</u>
Organization Name	70	Y	The name of your organization or church
Addr1	40	Y	The first line of your organization's address

Addr2	40	Y	The second line of your organization's address
Addr3	40	N	The third line of your organization's address
Phone	18	N	Your organization's phone number
Receipting Person	60	Y	The name and title of the person who signs the charitable receipts
Charitable Number	20	N	Your organization's charitable number that goes on the receipts
Year	4	Y	The final year that you will be importing data for (for example 2019)
Allow January	1	Y	Should always be set to 0, ignored
DB Schema Version	20	N	This must be present, but can be anything - it is automatically replaced by a correct value by the program

**DONOR19.TXT:**

<u>Field</u>	<u>Max Length</u>	<u>Required</u>	<u>Description</u>
Donor Number	9	Y	This is a numbering of the donors. Each donor must have a different number. If you use the previous year file as well (for example donor18.txt), when the same donor occurs in both files it must have the same Donor Number in both files. This number is never displayed in the program, and is different from a member or envelope number for the donor.
Year	4	Y	The year that you will be importing data for (for example 2019)
Business Name	60	N	If the donor is a business or organization, its name goes here
Last Name	30	N	The last name of the donor, or of a contact person at an organization if the Business Name is filled in.
First Name	30	N	The first name of the donor, or of a contact person at an organization if the Business Name is filled in.
Middle Initial	8	N	A middle initial or initials for the donor, or of a contact person at an organization if the Business Name is filled in.
Title	15	N	A title for the donor, such as Ms., Mr. etc., or of a contact person at an organization if the Business Name is filled in.
Addr1	40	Y	The first line of the donor's address
Addr2	40	N	The second line of the donor's address
Addr3	40	N	The third line of the donor's address (may contain the postal code if the Postal Code field is not used)
Postal Code	10	N	The Postal Code or Zip Code of the donor
Phone	18	N	The donor's phone number
Email	60	N	The donor's email address
Member / Env. Num.	9	N	A member or envelope number for the donor
Pledge Amount	Dollar amount	N	An annual pledge amount that the donor has pledged to donate (amounts of 0 will be ignored)

Other Info 1	50	N	For your own use for additional fields such as work phone, birthdate, etc.
Other Info 2	50	N	Same
Other Info 3	50	N	Same. (Note: Other Info 4 through 6 cannot currently be imported by this menu option.)

**Note:** Either a Business Name or both the Last Name and the First Name (or all three) must be filled in.

#### RECEP19.TXT:

<u>Field</u>	<u>Max Length</u>	<u>Required</u>	<u>Description</u>
Receipt Number	5	Y	This is a numbering of the receipts. Each receipt must have a different number, and they should be sequential. This number is displayed in the program, and printed on the receipt following the year. (For example if the year is 2019 and this is receipt number 23, it prints on the receipt as receipt number 2019-00023.)
Year	4	Y	The year that you will be importing data for (for example 2019)
Donor Number	10	Y	This must match the Donor Number imported from DONOR10.TXT for the donor who received this receipt.
Date Issued	?	Y	The date this receipt was issued (which is printed on the receipt) in a format that will be accepted by the program, such as MM/DD/YYYY. The date format is determined by your Windows Control Panel Regional and Language Options settings for the Short Date Format.
Total Amount	?	Y	The total dollar amount of the receipt, which is the total amount of all of the individual donations included in the receipt.
Eligible Amount	?	Y	The total eligible amount of the receipt. You should only fill in this field if it is less than the Total Amount.
Type	1	Y	"O" for Original, "D" for Duplicate, or "C" for Corrected

#### CATEG10.TXT:

<u>Field</u>	<u>Max Length</u>	<u>Required</u>	<u>Description</u>
Category Number	4	Y	This is a numbering of the donation categories. Each donation category must have a different number. If you use the previous year file as well (for example categ09.txt), when the same category occurs in both files it must have the same Category Number in both files. This number is never displayed in the program.

Year	4	Y	The year that you will be importing data for (for example 2019)
Description	20	Y	Your description of this donation category.

**DONAT19.TXT:**

<u>Field</u>	<u>Max Length</u>	<u>Required</u>	<u>Description</u>
Donation Number	10	Y	This is a numbering of the donations. Each donation must have a different number, at least within a given year. This number is never displayed in the program.
Year	4	Y	The year that you will be importing data for (for example 2019)
Donor Number	10	Y	This must match the donor number imported from DONOR10.TXT for the donor that made this donation.
Receipt Number	5	N	If this donation has already received a charitable receipt, this is the receipt number for it, and must match a Receipt Number in the file RECEP10.TXT. If this donation hasn't yet received a receipt, leave this blank.
Date Received	?	Y	A date in a format that will be accepted by the program, such as MM/DD/YYYY. The date format is determined by your Windows Control Panel Regional and Language Options settings for the Short Date Format.
Total Amount	?	Y	The total amount of the donation, with no dollar signs. Decimal places and cents are optional.
Eligible Amount	?	N	The eligible amount of the donation. This should be omitted if it is the same as the Total Amount. If it is included, it must be less than the Total Amount.
Category Number	4	Y	A category number matching a Category Number in CATEG10.TXT.
Cheque Number	20	N	The cheque number that this donation was paid with, or any text describing how the donation was paid. Standard options are "Cash", "VISA", "MasterCard", "Money Order", "Credit Card", "Debit Card", "Direct Debit", "PAC", "PAR", "PayPal", "Non-Receiptable" and "Pre-Receipted".
Description	50	N	Any additional Description you want recorded with this donation.

To use this import routine, first select **Database ⇒ Import ⇒ All Data**. A few questions will first come up, confirming that you want to use this routine, and offering to show you this help page. A window will then come up on which you need to enter the First Year to Import and Last Year to Import. If you are just importing one year's data, say 2019, enter that year in both of these fields. To enter a range of years' data, enter the first year you have data files for in the First Year to Import, and the last year in the Last Year to Import.

Then, click **Start**. If all goes well, you will see the files being imported listed one by one in the list area on the left. If it all works, it will tell you that it is done, and then you can just click **Close** to close this window, and start working with your imported data. More likely, however, you will need to try this a few times to get it right. You will get error messages telling you what is wrong with the files. Unfortunately these messages may not be very detailed. Re-read the detailed description of each file's format and contents above, and pay close attention to the maximum length of each field. [Contact us](#) if you need further assistance to get it working. (You may want to email us the files you are trying to import so we can examine them and try them here, and tell you what is wrong.)

## 5.28 Uninstalling DONATION

If for any reason you decide you do not want to use DONATION, you can uninstall it. **Please do not uninstall and reinstall DONATION in an attempt to resolve problems you encounter.** In our experience, this is seldom helpful, and there is a chance it could be harmful. Instead, [contact us](#) and let us know what your problem is, so that we can help you resolve the problem.

Unless you are positive that neither you nor anyone else from your organization will ever want to use DONATION again in the future, you should make sure that you have a good backup of the DONATION database before doing the uninstall.

To uninstall DONATION, just go to Control Panel, and select Programs and Features. You will see DONATION on the list. Click on it, and then click on the "Remove" or "Uninstall" button.

It will confirm that you want to uninstall it, then begin the uninstall.

It may ask you whether you want to delete some shared files. These are the Firebird database and PowerBuilder support files. If you are sure that you have no other applications (such as our ACCOUNTS program) that use these files, you can agree to delete them.

### Completing the Cleanup After an Uninstall

In most cases, uninstalling DONATION will still leave a few files in the installation directory (usually C:\Program Files (x86)\Donation or C:\Program Files\Donation) and the [Data Directory](#). This is due to technical limitations in the installation program. If you have uninstalled DONATION because you are positive you do not want to ever use it again, you can delete both of those entire directories after the uninstall has completed. (There is actually a message about that at the end of the uninstall process.)

### Uninstalling the Local Network Server Version of DONATION

If you are running the Local Network Server Version of DONATION, and are sure you do not want to use it again, and if in addition you are sure that you are not running any other applications that use the Firebird Server database software, you can also uninstall the Firebird Server from Add or Remove Programs. It will show as "Firebird 2.0.3" in the list of installed programs.

However, if you have version 3.11 or higher of DONATION, you may be prompted to uninstall the Firebird Server as part of DONATION's uninstall process. If you do get that prompt, and answer Yes, then you don't have to separately remove it with Control Panel.



### Uninstalling the novaPDF Printer Driver

If you have not purchased an individual license for the novaPDF printer driver (used for [Saving Reports, Receipts and Letters as PDF Files](#)), you may want to uninstall it after uninstalling DONATION. The DONATION uninstall program will prompt you as to whether to uninstall the novaPDF printer. If you answer No to that and still want to uninstall it later, you can do that via an Uninstall menu option on the **novaPDF Professional Desktop 5** menu under **Start** ⇒ **Programs** on your computer.

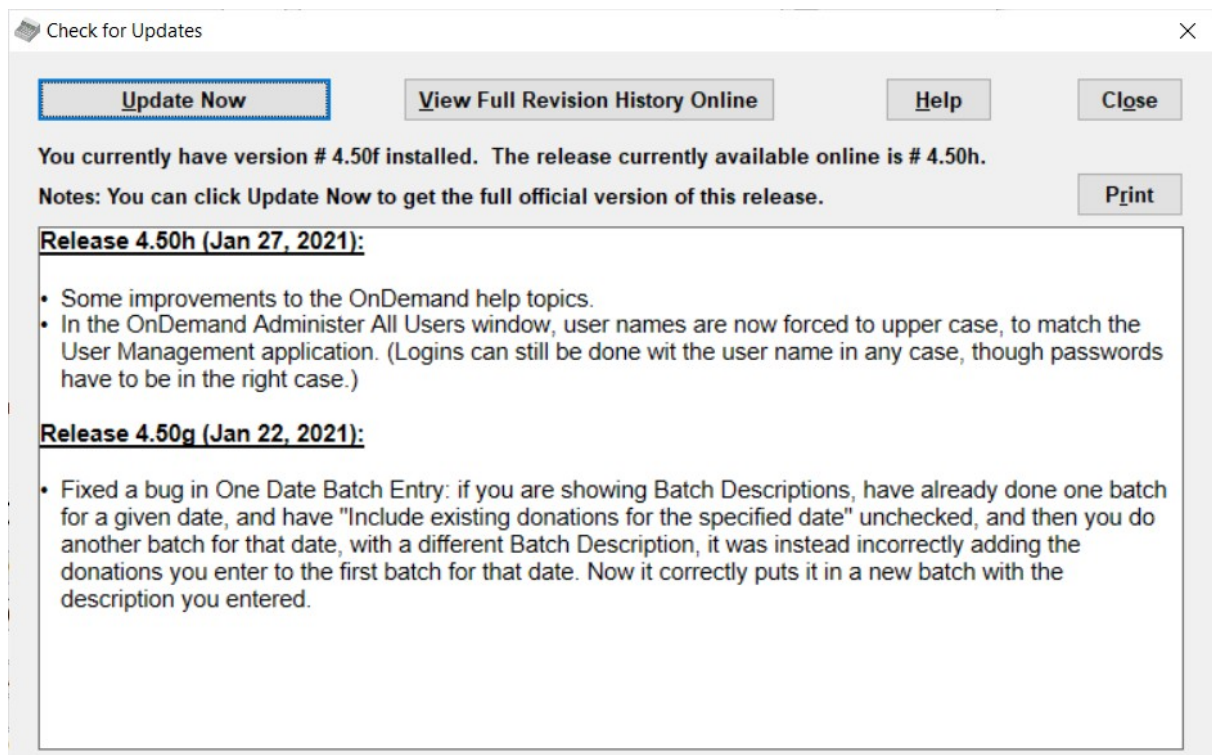
## 5.29 Checking for Updates

If you select **Tools** ⇒ **Check for Updates**, the program first checks whether you are connected to the Internet (which is required for it to work).

If for any reason you cannot use this menu option, or have problems with it, you can always upgrade by directly downloading and installing your current named version from the [DOWNLOAD](#) page on the website, on top of what you have now. You determine the name of your version to install with the program's **Help** ⇒ **About DONATION** menu option.

If you choose this mention option and you **are** connected to the Internet, a small file is first invisibly retrieved from the Software4Nonprofits.com web site, which has information on the latest version available for download, and when that version was released. That information is compared to your current version number (which you can also see via **Help** ⇒ **About DONATION**), and also to the date up to which you are eligible for email support and upgrades (assuming you are not still evaluating the program, and not using the free legacy [Lite version](#)). That upgrades eligibility date can also be seen via **Tools** ⇒ **Request or Install License Key**. If you are still in your evaluation period, or using the Lite version, you are always eligible for updates. It also retrieves the current Revision History page, some of which may be displayed in the window.

At that point, some version of the following window comes up:



Note: If you are currently using the [Lite](#) version, another checkbox appears under the row of buttons in the window above, titled "Update from free Lite version to full paid Standard version". If you check that checkbox, rather than updating your Lite version to the newest version of the Lite version, it updates you to the newest paid version. You will need to pay the Annual Fee, if you have never paid before, to convert that from the Evaluation version that it will start as, to the full version.

If you do not periodically use the menu option to show this window, you will be prompted to open it as you close the program, once a month, just to help encourage you to keep up to date with the latest improvements and bug fixes in the program.

To help you figure out whether you might want to take a new update, the latest changes since your current version, up to the currently available version online, are shown in the text area of the window, excerpted from current online version of the Revision History help page. You can compare that to your current version, to see whether any of those recent changes seem particularly appealing. You can use the **Print** button to print what is displayed.

If you want to see that entire page online (including the hyperlinks in it, to navigate to the detailed pages about changed features), you can click the **View Full Revision History Online** button, which takes you to that page on the Software4Nonprofits.com web site. That page shows you a list of all of the changes in all recent releases, up to the most up to date one. (By comparison, the **Help ⇒ Revision History** menu option shows you the same Help page in your currently installed version, which may be older.)

The first button on this window, shown above as **Update Now**, will have varying text depending on your current situation. If you are already up-to-date, the button changes to say that and is disabled, and the text area showing recent improvements is removed from the window, since there aren't any recent improvements! If your currently installed license key

doesn't indicate that you are eligible for updates, the button text changes to **Check Eligibility**. Clicking the button does the actual check for updates, if you are eligible for them, and gives you more information if not.

Once you check that button you are shown a message box explaining whether or not there is a newer version of DONATION available, and if so, whether you are eligible to download and install that version, based on your email support and upgrades eligibility date.

If you are using the [OnDemand Version](#), the program is automatically kept quite up-to-date on the server on which it runs, so this window will never actually does updates, it just tells you the update status on the server. Occasionally there may be up to a week's delay between a release of the program and the OnDemand server being updated.

Sometimes the program will say that you are not eligible for updates when you know that you have indeed paid for DONATION within the last year (which is the determining factor). In that case, you just need to request an updated license key through the button on the **Tools** ⇒ **Request or Install License Key** window. (If you have an Internet connection on your computer, and have taken one of several actions that communicates your database's Unique ID to us, this may happen fairly automatically when you choose that menu option.) Once you have received and installed your updated license key, the program will know you are up to date, and you will be able to perform the update.

If there is a new version and you are eligible for it, you are given an option to download it. If you answer Yes to do the download, please read the message boxes that come up next carefully, to understand the process. Note: if you have used this option before for the same version but for some reason not completed the installation successfully, the program will actually notice that the installation file has been downloaded before, and give you an option to just use that file, rather than downloading it again.

If there is a new version and you are not eligible for it, you are given an option to go to the [PRICING](#) page on the web site to see about making an Annual Fee payment in order to resume your eligibility for email support and upgrades. Once you have made a payment, and requested, received and installed an updated license key to inform your copy of the program that you are now once again entitled to email support and upgrades, you can come back to this option to take the upgrade.

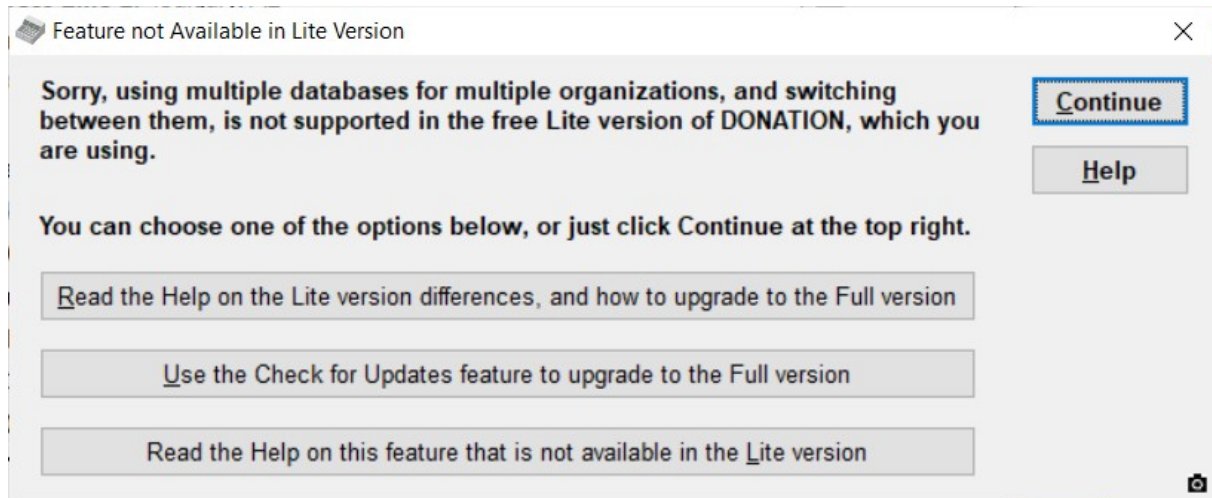
Before actually downloading the update file, you are given an option to backup your database first, to protect yourself in the very unlikely event that the upgrade somehow affects your database. (There is no reason it would do so, but it's always better to be safe than sorry!) The only exceptions to this backup question are that users of the Local Network Client Version of DONATION are not prompted with it. For the Local Network Client Version, the user of the Local Network Server Version always needs to have updated first, to be sure the update will work for everyone, and it's easier to do the backup from the Local Network Server Version. (There is only one database when you use the Local Network Versions of DONATION - the one on the computer running the Local Network Server Version.)

During the downloading of the update file, a window will be displayed showing the progress of the download. Once the download has completed, you will be prompted to run the downloaded update installation file. Just follow the prompts - it is quite self-explanatory.

You can also click **Help** on the window above to view this help page. Click **Close** when you wish to exit the window.

### 5.30 The Lite Version Limitations Window

If you are using the free Lite version of DONATION, and you try to use a feature that is not supported in the Lite version, you will be shown a window such as the following:



To just continue using DONATION (of course, without using the indicated feature that is not in the Lite version!), just click the **Continue** button or press **ESC**.

Or, you can click the **Read the Help on the Lite version differences, and how to upgrade to the Full version** button to [read the Help page](#) showing the differences between the versions.

Or, you can click the **Use the Check for Updates feature to upgrade to the Full version** button to go to the [window](#) that will allow you to update to the full version. Upgrading to the full version will give you an evaluation version of DONATION (unless you have paid for the full version previously), which is good for 30 days. After that, you will have to pay the usual Annual Fee in order to get a license key, which converts the evaluation version to the full version. You can also optionally switch back to the free Lite version, if you prefer.

Or, you can click the **Read the Help on this feature that is not available in the Lite version** button, to understand the feature that you are missing out on by using the Lite version.

Finally, just clicking the **Help** button on the right displays this help page.

### 5.31 Lite Version Limitations

There are two main versions of DONATION available - the full-featured, paid versions (Standard, [OnDemand](#) or [Network](#)), and the free, more limited Lite version. If you are not sure which version you have, go to **Help** ⇒ **About DONATION** in the program. If it says the Version is "Free Lite Version", "Free Lite Local Database Version", "Free Lite Standalone Version" or "Free Lite Standard Version", then it's the Lite version. If it says anything else there, it isn't.

#### Paid Versions

The full, paid versions have all of the features documented in this manual. They start out as evaluation versions, and they change to the full version when you pay the Annual Fee and get a license key for the program. You can go to the [PRICING](#) page on the web site to see how to pay, and how much that will cost.

The Standard version is free if you have no more than 50 donors with donations in the current year.

### Lite Version

The free, Lite version of DONATION has almost all of the same features as the paid versions. It is designed for use by smaller charities and churches.

The Lite version can always be upgraded to the paid full version if you wish, by installing the full version from the [DOWNLOAD](#) page on the web site, at <https://software4nonprofits.com/download-all/>, or via the **Tools** ⇒ **Check for Updates** menu option, which will give you the evaluation version. Then paying the Annual Fee entitles you to a license key, which converts the evaluation version to the full version. You can also optionally switch back to the free Lite version, if you prefer.

### Limitations

There are only two limitations of the free Lite version:

- It can only have up to 100 donors with donations in each year.
- You can only have one database for one organization, on any one computer.

The Lite version does not need and cannot use the license keys that are required by the full version. Thus, the **Tools** ⇒ **Request or Install License Key** menu option is not needed by the Lite version.

### Support

Users of the Lite version are entitled to free support, though it may have lower priority than our support for users of the paid versions.

### Previously Excluded Features

Until release 6.02b of DONATION, the Lite version had far fewer features than it does now. The following are the features that are now supported in release 6.02b and later, but were previously excluded:

- The [One Date Batch Entry](#) window, which helps churches enter the Sunday collection more quickly
- Memorizing [recurring donations](#)
- Several Donor Details fields: the Email Address field, the Groups / Committees field, the six renameable Other Info fields, and the Comments field. Since the email address field was excluded, emailing donors and emailing receipts were both also excluded, as was the [Email Sending Configuration](#) option.
- [Email Backups](#), [Internet backups](#) and the [Cloud Storage Service](#)
- Pledging options other than simple annual pledging



- The [Limited User](#) password (used in churches for counters or tellers to record donations, seeing only envelope numbers but not names)
- The Read Only and Donors Only passwords
- [Configuring](#) and [creating](#) bank deposits - you could instead just use various reports to help understand what is in your bank deposit.
- The [Letters](#) menu options for mail-merge letters and mail-merge versions of receipts (as opposed to the standard built-in versions)
- [Custom Reports](#), [Memorized Reports](#) and automated [Reports Scripts](#)
- From the Receipt menu, the [All Donors](#) and [Filtered Donors](#) options
- From the Database menu, the following options: all [Importing](#) options, [Reassign Envelope Numbers](#), [Merge Duplicate Donors](#), [Change Date of Donations](#) (mostly only needed if you could use One Date Batch Entry), and [SQL Select](#).
- The only available and recommended way of sharing your database between users on multiple computers with this version was [Transfer your Data between Computers](#), the least safe way of doing so. See [Multiple User Options](#) for the other ways available to other versions of the program, and now to the Lite version.
- The [Abundant](#) online donation system integration.

## 5.32 Running on a Mac

The only version of DONATION that that you can run directly on a Macintosh (Mac) computer is the [OnDemand](#) version, because it is cloud-based and run through just a small OnDemand client program that is also available for Macs. It will still look like a Windows program when you run it though!

For all other versions, the following information applies.

The answer to whether you can run DONATION on a Mac is "yes and no". First, DONATION is a program designed only for Microsoft Windows, and we do not expect that to change, because the programming language we write it in is not available for the Mac.

However, some newer Macs have Intel processors and allow you to boot up to either the Mac operating system or Windows. In that case, it is just like running on a regular Windows PC.

There are also programs available for your Mac such as Parallels (<http://www.parallels.com>) that allow it to run Microsoft Windows programs. (You also have to buy and install a copy of Windows to use with Parallels.) We do know of some users who have done this successfully. If you try this, be sure to reboot your Mac after the installation of DONATION. One user has reported that the PDF printer installed with DONATION would not work for them under an earlier alternate to Parallels (VirtualPC), however.

We have to make one thing clear, however, if you do want to try using programs like Parallels to run DONATION. We don't own a Mac, and we have no particular expertise with Macs. Thus, although we can answer the same how-to questions etc. as we would answer for users of DONATION on Windows, if you are using products like Parallels and you have any problems that are specifically related to running it on a Mac, we may not be able to help you with them. Sorry!

Your other option of course is to find a Windows PC you can run the program on, or have someone else do so!

### 5.33 Command Line Arguments and Options for DONATION

This is a technical topic, that will not be relevant to very many users, but we are including it for completeness.

Normally you start DONATION by double-clicking on its icon on your Windows Desktop. In that case, normally it starts by just running the program's executable file `donation.exe`, without any arguments or options on the command line following that. However, there are some situations where arguments are added automatically, and some other situations where you may want to create an alternate icon that adds some options.

DONATION will process a filename argument, or one or more options, as described below, but never both.

#### Filename Arguments on the Command Line

DONATION has several file associations set up for it, which means that if files with certain extensions (the part of the filename after its last period) are opened or run, then DONATION will be run with the complete path to the filename added as an argument. This is not generally something you would do directly (like by typing a command in a Command Prompt window) but rather happens automatically based on the file association.

The associations for DONATION are:

- **.GBK**: regular database backup files made with the **Backup/Restore ⇒ Backup Database** [menu option](#).
- **.S4B**: emailed database backup files made with the **Backup/Restore ⇒ Email Backup** [menu option](#).

So for instance what actually happens when you double-click on a backup file named `DONATION-2018-10-23.11.04.50.DB.GBK`, or ask to Open it as an attachment in an email program etc., is that the following command line gets automatically run (with variable elements indicated in *italics*):

```
"C:\path to executable file\donation.exe" "C:\path to backup file\DONATION-2018-10-23.11.04.50.DB.GBK"
```

As long as DONATION is not currently open, doing this will start DONATION and cause it to prompt you to restore that backup file.

#### Options for All Versions of DONATION

The only option that applies to all versions except for OnDemand is **/D**, which puts the program into "debug" mode. What that means is that it will give some extra technical message boxes in some parts of the program, and do some extra logging to files, such as the `debug.txt` file found in the directory accessed with the **Tools ⇒ Explore Temp Directory** menu option. We would strongly discourage anyone from using this option unless we ask you to do so, as part of trying to determine the reason for a problem you are having. (And only a very small fraction of the problems that can occur with DONATION will be helped by turning on this option, so again, please don't just try it yourself!)



Another way to put the program into "debug" mode, if we ask you to do so, is with the **Tools** ⇒ **Turn Debug Mode On** menu option.

#### Options for the Standard and Local Network Versions of DONATION

The option **/E extension** can be used when you have multiple databases that you can switch between with the **Database** ⇒ **Switch Databases** [menu option](#). Adding it on the command line does an automatic switch to the database with that extension in the Switch Databases window.

So for instance if your databases have the extensions DB and DB2, using **/E DB2** will automatically open the program switched to that database, regardless of which database you were last using. (Normally the program opens to the one you were using last.)

Some users with two or more databases may want to make copies of their icon for DONATION, add this switch to them, and rename them appropriately, so they can immediately open a specific database by using that alternate icon. Details on how to do that are lower down on this Help page.

One other option is:

#### ***/P "ProgramEntryPassword"***

Using that options causes the supplied program entry password to be automatically entered into the Standard or Local Network Version's in login window, and the **OK** button on that window to be clicked, thus doing an automatic login, as long as it is correct of course.

This could be added to a copy of your icon for DONATION, renamed appropriately, to do an automatic login. Details on how to do that are lower down on this Help page.

Please be aware that if you do add this option to an additional icon for starting DONATION, you are essentially giving away any security on the program enforced by requiring the entry of the program entry password. So we would strongly encourage you to only consider using this option on a secure computer, not accessible to anyone that you don't wish to have access to your DONATION data!

Also there's one tricky issue: if by any chance your program entry password includes a double quote character, that must be changed to two double quote characters, within the double quotes surrounding it, after **/P**. So for instance if your program entry password is **a234"B567**, the option you would use would be:

***/P "a234""B567"***

#### Options for the OnDemand Version of DONATION

You can add options to the existing command line for starting the OnDemand client program, in the Properties of the icon used for it. Specifically, if you wish to supply your username and password and not have to do a login every time, add this at the end of the command line:

***-u username -p password***

If you do that, you will have to change the command line arguments every 180 days, when the OnDemand system requires you to change your password.

#### How to Add Options to a Copy of your DONATION Shortcut Icon

If you do want to create an alternate version of your DONATION icon with certain options listed above added to it, unfortunately it is not as easy as one might hope. Copying and pasting right on the Desktop just causes problems and creates copies that aren't working shortcuts. Instead, please follow these steps:

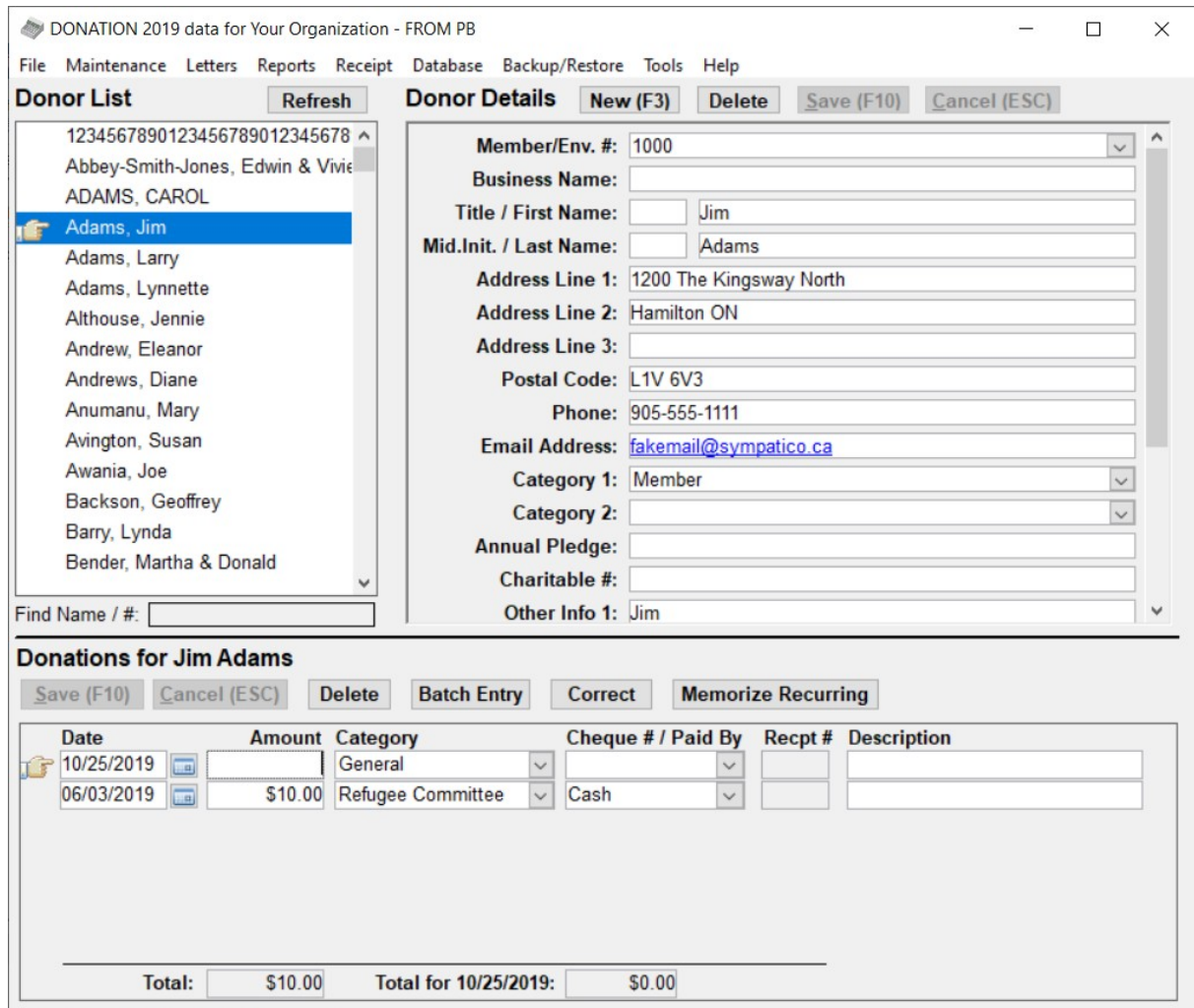
1. Open Computer or Windows Explorer.
2. Navigate to where the DONATION program files are located - most commonly C:\Program Files\DONATION, or on 64-bit computers C:\Program Files (x86)\DONATION.
3. Find donation.exe there, right-click on it, and pick **Send To** ⇒ **Desktop (create shortcut)** from the popup menu.
4. Go to your Windows Desktop. There will now be two icons for DONATION.
5. Right click on the one you suspect is the new one (generally, the one added at the end of your existing icons) and pick **Properties** from the popup menu.
6. Change to the General tab in the window that comes up, and make sure that under Location, it says C:\Users\yourloginname\Desktop. If it says C:\Users\Public\Desktop, that is the original icon installed by DONATION, and you need to exit that window, find the other icon, right-click on it and pick **Properties**.
7. Still on that General tab, in the editable field at the top for the name of the shortcut, change it to something identifying, like say **DONATION DB2 Login** if this is for the purpose of logging in to the database with the extension DB2, with the options **/E DB2**.
8. Switch to the Shortcut tab. In the editable field for Target, get your cursor to the end of what is there, add a space, and then add whichever options you want to add.
9. Click **OK** at the bottom to save your changes.
10. Test both icons to make sure they do what you want!

If something gets messed up and your icons don't work, your best option to fix things is to just re-download and install the desired version from the DOWNLOAD page on the website, <https://software4nonprofits.com/download-all/>, on top of what you have now. That will restore a normal desktop icon for DONATION, in C:\Users\Public\Desktop.

## 6 REGULAR OPERATING PROCEDURES

### 6.1 The Main Window

The program's main window that comes up when you start the program will look something like this, with some variations depending on some options you can set:



**DONATION 2019 data for Your Organization - FROM PB**

File Maintenance Letters Reports Receipt Database Backup/Restore Tools Help

**Donor List** Refresh

1234567890123456789012345678 ^

Abbey-Smith-Jones, Edwin & Vivie

ADAMS, CAROL

Adams, Jim

Adams, Larry

Adams, Lynnette

Althouse, Jennie

Andrew, Eleanor

Andrews, Diane

Anumanu, Mary

Avington, Susan

Awania, Joe

Backson, Geoffrey

Barry, Lynda

Bender, Martha & Donald

Find Name / #:

**Donor Details** New (F3) Delete Save (F10) Cancel (ESC)

Member/Env. #: 1000

Business Name:

Title / First Name: Jim

Mid.Init. / Last Name: Adams

Address Line 1: 1200 The Kingsway North

Address Line 2: Hamilton ON

Address Line 3:

Postal Code: L1V 6V3

Phone: 905-555-1111

Email Address: [fakemail@sympatico.ca](mailto:fakemail@sympatico.ca)

Category 1: Member

Category 2:

Annual Pledge:

Charitable #:

Other Info 1: Jim

**Donations for Jim Adams**

Save (F10) Cancel (ESC) Delete Batch Entry Correct Memorize Recurring

Date	Amount	Category	Cheque # / Paid By	Recpt #	Description
10/25/2019		General			
06/03/2019	\$10.00	Refugee Committee	Cash		

Total: \$10.00 Total for 10/25/2019: \$0.00

In the title bar of the window, you can see the year you are working on, and your Organization Name.

Below that is the [main menu](#).

Then at the top left, you have the Donor List, a scrolling list of all donors you have entered into the program. See [Finding a Donor](#) for how to navigate in that list.

To the right of that is the Donor Details area, displaying the details of the currently selected donor in the Donor List. There are also buttons above that, such as **New (F3)**, used when you are [creating new](#) or [editing existing donors](#).

On the bottom third or so of the window is the Donations area, unless you have entered the program with the [Donors Only Password](#), in which case that area is removed.

The Donations area shows the name of the person whose donations are being shown, and their donations in the current year. (There are options that can cause it to show donations in additional years.) Again, there are buttons above the list of donations for use when you are working with donations, including the **Batch Entry** [button](#) that takes you to a separate window, mostly used by churches, for entering a batch of donations that are all on the same date. But you can also [enter donations](#) directly on this window.

If you have more donations in the current year than will fit in the space available, a scroll bar will appear.

At the bottom of the Donations area are two totals. The first one, labelled just "Total", is the total donations in the current year for this donor. The second, "Total for [date]" is the total donations for the date of the currently selected donation row (the one with the hand pointing to it at the left).

To enter and see donations in a different year, assuming you have been using the program for more than one year (or imported more than one year of donations from some other program), use the **Maintenance** ⇒ **Change Year** [menu option](#).

You can change a number of things about the display of this main window, including exactly which fields are displayed on it, and the names of some fields, with the **Maintenance** ⇒ **Main Window Options** [menu option](#).

**See Also:** [Regular Operating Procedures](#)

## 6.2 Regular Operating Procedures

All you will do on an average day in which you receive donations is to [find each donor](#) on main window's Donor List, then use **F2** (or just click into the row for a new donation) to [enter the donation](#).

If you get to a donor who is not yet on the list, click the **New** button above the Donor Details area or press **F3** to [enter the new donor](#) before entering the donation.

To quickly enter a weekly collection or offering for a church or other place of worship, use [One Date Batch Entry](#).

The main window and the One Date Batch Entry window (as well as the editor window for mail merge letters) can be resized. To do so, click and drag any edge or corner. You can also move these windows by clicking on their title bars and dragging them. When you re-open them the next time, they will be the same size and at the same position as when you last used them.

If you make a number of entries and have not done so recently, do **Backup/Restore** ⇒ [Backup Database](#). (You will also be [reminded](#) to do so regularly, unless you have turned that option off.)

If you find that any donors' cheques are returned NSF from the bank, be sure to delete those donations from the program! Do not issue receipts before you have had time for cheques to clear.

If you receive address corrections for any donors, fix them up by finding the donor on the list, clicking into their information in the Donor Details area, making the change, and pressing **Enter** or **F10** or clicking the **Save** button to save the changes.

If you realize there is a new category of donations, add it in with **Maintenance** ⇒ **Donation Categories..**

You may want to run one or more variations of the report under **Reports** ⇒ **One Date Donation** after each day's work to have a printed record of your entries from that day.

If a donor wants an immediate receipt, [create](#) one with **Receipt** ⇒ **Current Donor Original**.

**See Also:** [Year End Procedures](#)

## 6.3 Features for Churches

There are a number of features in DONATION that are particularly useful for churches and other places of worship.

### Quick Multiple Donation Entry

The most significant feature for churches is the ability to quickly enter many donations made on the same date, for instance from a Sunday collection or offering in a church, using the **File** ⇒ **One Date Batch Entry** menu option (or equivalently the **Batch Entry** button above the donations area on the main window). For details, see [One Date Batch Entry](#).

### Envelope Numbers

Many churches use envelopes for their collections, and thus you will probably want to enter your envelope numbers into the Donor's **Member/Env. #** field. You can type these in directly, but you can also enter them as sequential numbers by right-clicking in that field, and picking one of the following two options from the popup menu:

- **Next Higher Member/Env. #**, which assigns the next highest number, after the last one that has been assigned to any donor, or
- **Lowest Unused Member/Env. #**, which assigns the number that is the first gap in the sequential numbering (or 1 if that hasn't yet been assigned to any donor).

Both of these options obey the setting for the "Lowest Member/Env. # for automatic assignment" on the Donor tab of the **Maintenance** ⇒ **Main Window Options** [window](#).

You can also auto-assign (or re-assign) all or some envelope numbers - see [Reassigning Envelope Numbers](#).

You can [find donors](#) on the Donor List quickly by envelope number, just by typing the number, which causes DONATION to immediately scroll to the donor with that envelope number.

### Limited Users of DONATION

Some churches have people assigned to be Tellers or Counters who are allowed to use DONATION to enter the collection, but should only see the envelope numbers and not the donors' names. There is a special feature for that, called the [Limited User Password](#). Users who sign in with the Limited User Password have very restricted features available to them. You can control what those features are with options in the Limited Users tab of the **Maintenance** ⇒ **Main Window Options** window.

There is also a training video on Special Features for Churches on the [Demos and Samples](#) web page, if you would prefer to see these features demonstrated live, rather than reading about them.

## 6.4 Year End Procedures

This page lists the processes that you will likely want to do at each year end. Some of them are optional, but the switch to the new year via the **Maintenance** ⇒ **Change Year** [menu option](#) is absolutely required, because if you do not do that, you cannot enter donations for the new year. Also, although there is a suggested order of activities in the paragraphs below, you can use your own judgment about what order to do most of them in.

There are no special dates on which the program needs you to do these activities, like before or after the actual year end. However, in Canada the CRA suggests that all receipts should go to donors by the end of February, and in the USA, our understanding is that the IRS requires them to go by the end of January.

Please note that a year end in DONATION is normally a calendar year end, because for most users the program works on a calendar year basis. However, if you are in a country like the United Kingdom, Australia or New Zealand and are [Using Fiscal Year Data Entry and Receipting](#), the year end referred to in this topic will be your fiscal year end.

### Preparation for Receipting

Once you have received and entered all of the donations for the year, and left enough time to make sure none of the cheques you deposited were NSF, make a [backup](#) of your data with **Backup/Restore** ⇒ **Backup Database**. As always, that backup should be not be on your hard drive, in case it dies! (For instance, put it on a USB memory key.)

You may wish to check your data before printing the year-end receipts. To do this, you might want to use these two reports: **Reports** ⇒ **Donors** ⇒ **Addresses** and **Reports** ⇒ **Donation** ⇒ **All Donations** ⇒ **Sort by Name**. You can either print these out on the printer, or just view them on the screen. Check that addresses are correct, and that the donation details look correct. Check that you have not entered any donations twice by accident.

### Receipting

You use **Receipt** ⇒ **All Donors** to generate all of the year-end [receipts](#), and click **Print** to print them. (Users who wish to send receipts only to donors who have donated more than some fixed amount may prefer to use the **Receipt** ⇒ **Filtered Donors** [menu option](#) so that they can do so.) Either accept the option to print another copy for your records, or save a PDF copy and store it securely - not on the same computer - for your records. (For Canadian charities, the CRA requires that you keep copies, although arguably the copy in the database should be sufficient.) Another option is to use the **Email/Print** button to [email receipts](#) to those donors who have email addresses, and print the rest.



Also for Canadian users, use **Receipt** ⇒ **Gift in Kind Receipts** ⇒ **All Donors** to print any receipts for [Gifts in Kind](#). And for both cash and Gift in Kind receipts in Canada, you may have to do the **All Donors** menu options twice, if you have donations both with and without [Advantage](#).

Make sure you haven't missed receipting any receiptable donations, by running **Reports** ⇒ **Donation** ⇒ **Unreceipted**, and seeing that it says there is no matching data.

You should also make sure you haven't missed printing any corrected receipts - ones where you have changed something so that the total amount of the donations included in it does not match the original receipt amount - by use **Reports** ⇒ **Receipt** ⇒ **Incorrect**. Examples of how this could happen are if you [deleted a donation](#) included in an existing receipt, or used the **Correct** button to [edit a donation](#) including in an existing receipt. Any receipts that show up on the report need to be printed and sent to the donors, with **Receipt** ⇒ **Duplicate/Corrected by Number**, or for Canadian users with incorrect Gift in Kind receipts, with **Receipt** ⇒ **Gift in Kind Receipts** ⇒ **Duplicate/Corrected by Number**.

Once the receipts are all printed off, you can print mailing labels or envelopes for them with **Reports** ⇒ **Receipt** ⇒ **Mailing Labels** or **Reports** ⇒ **Receipt** ⇒ **Envelopes**. When prompted for the date by either of those reports, enter the date you created the receipts, which is probably the default of today's date. Mail out the receipts to the donors.

Next, make another backup of your data in a different place, or with a different filename, from the backup you made before creating all of the receipts.

### Changing the Year

You can do the following steps before or after the receipting steps in the section above - a paragraph below tells you how to switch back to a previous year to do receipting if you change the year before the year-end receipting.

You enable the program to enter data for the next year with the **Maintenance** ⇒ **Change Year** [menu option](#), by selecting the new year in that window and clicking **OK**. This will create new data for the next year (say 2018), by copying over all of the donors and categories from this year. Note that this is still stored in the one database file, DONATION4.DB, and backups back up all years of data. This process will ask you to confirm that you want to create the new year's data by copying over donors and categories from this year. If you answer No to the prompt, it will not start the new year.

If you answer Yes, it will then ask whether you want to copy all donors and categories, or only ones that have donations in the last 2 years. In effect, this gives you an option to delete donors that have no donations. Many users probably answer "Only copy ones with donations in the last 2 years" (which actually lists those 2 year numbers in the button text) to delete those old donors, to reduce clutter in their lists of donors, but do use your own judgement about this! Please note choosing that option does not delete any data from prior years. It merely reduces the list of donors copied in to the new year.

If you want to see who those donors are that have not given any donations in the last 2 years, to help you decide, you can use **Reports** ⇒ **Donor** ⇒ **Old Donors** before doing the **Maintenance** ⇒ **Change Year**.



You are now ready to enter donations for the new year.

You can always switch back to do further work on the previous year (for instance for receipting, including to issue a duplicate or corrected receipt if you later find out one was missed or incorrect) by using **Maintenance** ⇒ **Change Year** again. You can always tell which year you are working on because it is shown in the title bar of the main window, for example "DONATION 2017 data for *Your Organization*". You can switch back and forth between the two years as often as you wish. You can also switch back to even earlier years by using **Maintenance** ⇒ **Change Year**.

You can in fact do the **Maintenance** ⇒ **Change Year** to create the new year **before** the year end if you wish to get a head start on the next year, for instance to do some hand deletion of inactive donors, reassign envelope numbers, update the annual pledges, etc. (The pledge amounts are optionally copied from the previous year.) However, you should be aware that once you start the new year, the donor records for each of the two years are in effect completely separate. Thus, for instance, if you enter an address change for a donor in one year, you will also have to make the same change (if it is needed) in the other year.

If you add a new donor in one year, it will not appear in the other year, so you will have to use the [option Database](#) ⇒ **Copy Missing Donors** if you want it to be in both years. **Copy Missing Donors** can also be used to recover all donors from the previous year that weren't copied to the current year, if you chose the option to skip copying donors with no donations for the last 2 years, when you first switched to the new year.

#### Other Steps

You may also want to [delete old data](#) in the database before or after the year-end, using **Database** ⇒ **Delete Old Data**.

For users who use member or envelope numbers, if you want to renumber everyone in the new year, you can do that with the **Database** ⇒ **Reassign Envelope Numbers** [menu option](#), after switching to that new year.

If you use the program's [Bank Deposits](#) features, bank deposits cannot include donations in two different working years. So if you have moved on to the new year but still need to do a bank deposit including donations from the previous year, you will need to temporarily switch back to that year, to do a bank deposit including only the remaining donations in that year. Then you can switch back to the new year, and do a 2nd bank deposit (if necessary) containing the new donations in this year.

## 6.5 Changing Years in the Database

In DONATION, each year's data is conceptually separate, though all years of data are included in the same actual database file, and they are all backed up by any backup.

**At any one time, you are only working on one calendar year's data in the program** (or one [fiscal year's](#) data, in some countries). So you can only see the donors that are present in that year, which may be different from the lists of donors in any other years during which you used the program. You also only see the donations for that year on the main window, and can only enter donations for that year. (There are [options](#) to also see, but not edit, prior years' donations on the main window.) Some reports show multiple years of data, and you can always

get to see and enter the donor and donation details for other years by changing years in the program, as explained below.

You switch between years of data in the database with the **Maintenance** ⇒ **Change Year** menu option. That brings a window such as the following:



This window will only show the years of data that you currently have in the database. It will also show the next year to be added at the top of the list, unless the year after the current working year (according to your computer's system date) is already in the database. (I.e. if the current system date is in the year 2016, it will let you add 2017, but will not yet let you add 2018.) And finally it also shows the next earlier year that can be added, at the bottom of the list. Click on a year and click **OK** (or double-click on the year) to switch to that year.

If for some reason you have to move forward (or backward) multiple years beyond the years of data that are currently in the database, just use the menu option repeatedly, moving one year at a time.

You can always tell which year you are working in, because the title bar at the top of the DONATION window reads "DONATION YearNumber data for *YourOrganizationName*".

When you switch to a new year for the first time, a copy is made of all (or most) of your donor records, and all donor and donation category records. You can then start entering donations for the new year.

If you have never switched to that year before, the program will first confirm whether you wish to create the data for that year - you must answer Yes to proceed.

You will also be asked whether to **skip** copying donors that have not donated in the last 2 years. If you answer Yes, only donors present in the previous year that have donated within the last 2 years will be copied into the new year. If you answer No, all donors from the previous year will be copied. Please note that answering Yes does not delete any data from prior years. It merely reduces the list of donors copied into the new year.

In addition, if you have been entering [pledges](#), it will ask whether to copy the pledge information for donors from the year you are copying from to the new year.

You can also create an earlier year that does not yet exist in your database with **Maintenance** ⇒ **Change Year**.

If you have created a new later year with **Maintenance** ⇒ **Change Year**, and decide you really didn't want to do so yet (perhaps because you want to first make some donor address corrections), you can delete that latest year you created with the **Database** ⇒ **Delete Latest Year** [menu option](#), but only if you have not yet entered any donations for that year.

If you are in a new year and you need to go back to a previous year to do some work (for example to create a [Corrected or Duplicate receipt](#)), just use **Maintenance** ⇒ **Change Year** again to switch to the desired year. Next, do the required work in that year. Finally, switch back to your current working year with **Maintenance** ⇒ **Change Year** again.

#### Donors in Different Years are Separate

Once donors have been copied to a new year, they are separate from the donor records in the year they were copied from. Changes made in a given donor's record for one year, such as address corrections, will not be automatically made in any other year. If you want those changes to be present in multiple years, you can switch to the other year and re-do the changes (but see below for another option!). The same applies to changes to any donor or donation categories, for example changing their names.

A larger problem occurs if you add donors in one year and want them to also be present in another year. The most likely case is if you have moved to a new year, around the year end, then switched back to the previous year to add some final year-end donors and donations. You will want those newly added donors in the previous year to also be present in the new year's records. To achieve that, you use the **Database** ⇒ **Copy Missing Donors** [menu option](#).

A slightly different problem occurs if you change one or more donors' postal addresses or email addresses, and want those changes to also be present in another year. That can be done with the **Database** ⇒ **Copy Addresses** [menu option](#).

#### Multiple Users

If you use any of the [Multiple User Options](#) to share a database between multiple computers, please be aware that the current working year in the program is stored in the database itself. So for instance if you switch back to a prior year to look something up or make some corrections, and don't switch back, any other user accessing that same database or a copy of it will end up in the same prior year when they start the program. So it's a good idea to always switch back to the current working year when you are finished working in a prior year, so as not to confuse the other users!

If another user is logged into the [Local Network](#) or [OnDemand](#) version of the program when you try to change the year, you will be given an option to change it temporarily for your copy of the program, without affecting other users. (Prior to release 4.59 of DONATION this was not allowed - the year could only be changed when there were no other simultaneous users running the program.) You still cannot create a new year that does not current exist in the database if there are other simultaneous users.

### Pledges and Changing Years

If you use pledges, there are some further details you should understand about what happens when you change to a new year for the first time, and it is copying donor data to the new year.

What happens exactly depends on what you have selected in the Pledges tab of the **Maintenance** ⇒ **Main Window Options** [window](#). (Note: If you have turned off the display of the Annual Pledge field on the Donor Details tab of that window, no pledge information will be copied, because the assumption is that you aren't using pledges.)

If you select the pledging type "Simple Annual Pledge", you will be asked whether or not to copy the Annual Pledge amounts.

If you select the type "Annual with Start Date and Category", you will be asked whether or not to copy the pledge data. If you answer Yes, pledge start dates in the new year will be set to be January 1st of the new year.

If you select the type "Multi-Year", no question will be asked. Any multi-year pledges whose range of years includes the year that you are copying to will be copied over, with exactly the same details as they had in the year you are copying from.

### Fiscal Years

If you are in a country like the United Kingdom, Australia or New Zealand and are [Using Fiscal Year Data Entry and Receipting](#), the years displayed in this window will show as things like "FY2015/2016" for the fiscal 2015/2016 year. If you converted to doing that after you already had some years of data in the program, only the working year in which you did the conversion and all following years will be fiscal years, so prior years will just show the year number, because they are still calendar years.

The title bar of DONATION's main window also changes to show which fiscal year you are working in, when you are doing so, such as ""DONATION FY2015/2016 data for *YourOrganizationName*"

## 7 GENERAL INFORMATION ON USING THE PROGRAM

### 7.1 General Information on Using the Program

We will assume that you have a basic familiarity with using Windows programs. There are just a few hints here to avoid common mistakes.

- When moving between entry fields on a screen (for example in the **Donor Details** area of the main window), press **Tab** to move forward or **Shift+Tab** (i.e. hold down Shift and press Tab) to move backward. Do not use **Enter** to move forward, as it will click the current highlighted button (for example **Save**, assuming changes have been made).
- Some fields can hold more than the displayed size of the field indicates. They will automatically scroll left and right as needed to allow you to enter or edit the data.
- Many menu options have keyboard shortcuts listed on the menu. Similarly for buttons. For instance, the **File** ⇒ **Save Changes** menu is equivalent to one of the two **Save** buttons, which is equivalent to pressing the key **F10** or **Enter**. If you learn and use these keyboard shortcuts your work will get done more quickly.
- Some windows, like the main window, the One Date Batch Entry window for donations, and the editor window for mail merge letters, can be resized. To do so, click and drag any edge or corner. You can also move these windows by clicking on their title bars and dragging them. When you re-open them the next time, they will be the same size and at the same position as when you last used them.

### 7.2 Keyboard Shortcuts

For those who wish to do so, a great deal of your work in DONATION can be done without ever using the mouse. In many cases, once you learn how to do this, it is much faster than using the mouse.

Many keyboard shortcuts available in the program are obvious, because they are displayed alongside the menu items or on the text of buttons on the main window. Some of them are:

<u>Key</u>	<u>Action</u>
<b>F1</b>	Help Contents and Index
<b>Shift+F1</b>	Context-sensitive help on the currently active section of the main window
<b>F2</b>	Edit the mostly empty new donation displayed on the main window
<b>F3</b>	Add a new donor on the main window
<b>F10</b>	Save the current donor or donation you are editing (Enter also does that).
<b>ESC</b>	Cancel changes on the current donor or donation you are editing
<b>Ctrl+F</b>	From the main window, bring up a window to <a href="#">find a donor</a> by any part of their name, their member / envelope number, or any part of their phone number, address, or email address

Other keyboard shortcuts are standard shortcuts that work in most Windows programs:

<u>Key</u>	<u>Action</u>
<b>Tab</b>	Move from field to field in a form, for example between fields when editing a donor or a donation
<b>Shift+Tab</b>	Move backwards between fields in a form

<b>Enter</b>	"Clicks" the default button of a form, usually called Save, OK, etc. You can see which button is the default button because it has a darker border than the other buttons. Also saves the current donor or donation you are editing, like F10.
<b>ESC</b>	"Clicks" the "cancel" button of a form, usually called Cancel, Close etc.
<b>Ctrl+A</b>	Selects all of the text in a field, so that it can be overtyped, deleted, cut or copied
<b>Ctrl+C</b>	Copy highlighted text in a field to the Windows clipboard
<b>Ctrl+X</b>	Cut highlighted text out of a field and put it in the Windows clipboard
<b>Ctrl+V</b>	Paste text from the Windows clipboard into the field the cursor is in

### **Entering Amounts**

When you are entering amounts, do not enter currency symbols such as the dollar sign, or commas - neither are allowed.

There is no need to enter ".00" after an amount if it has no cents.

Many fields for entering amounts open a [Calculator](#) window, if you enter any arithmetic operator (+, -, \* or /) in the field, other than a leading minus sign.

### **Entering Donation Dates**

You can type donation dates in directly, using the short date format set in the Windows Control Panel's Regional and Language Options. But you can also click on the calendar button to the right of the date, which pops up a calendar that you can use. Details on keystrokes you can use in the calendar are in [Using the Popup Calendar to Enter Dates](#).

When you first enter a date field, normally its first component (before the first slash or dash) will become selected (highlighted). Pressing the left or right arrow keys or the forward slash key (/) will cycle through the three components of the date field (month, day and year, in whatever order they are displayed on your computer). That can make it easy to just change one of those components, for instance the day of the month. Once it is highlighted, just type what you want to replace it with - there's no need to delete what is there first.

Special keys you can use to change the date in a date field itself (not the popup calendar) are:

- **T**, for **T**oday, sets it to today's date
- **+** increases it by one day
- **-** (minus/dash) decreases it by one day
- **M**, for **M**onth, goes to the start of the current month, or if you are already on the start of a month, to the start of the previous month
- **H**, for month**H**, goes to the end of the current month, or if you are already on the end of a month, to the end of the next month
- **Y**, for **Y**ear, goes to the start of the current calendar year, or if you are already on the start of a year, to the start of the previous year
- **R**, for yea**R**, goes to the end of the current calendar year, or if you are already on the end of a year, to the end of the next year

For all of these, it doesn't matter if you use the capital or small letter. And for + and -, it doesn't matter if you use the keys on the normal keyboard area, or the numeric keypad (if your keyboard has one), and whether or not they are shifted. (So for instance since in most



keyboards + is the shifted = key, you can press =, without shifting, and it will still work to increase the date by one day.)

Please note though that in most places in the program, the date you are entering will be restricted to be in the current working year, so some of those keys will stop working if pressing them would take you outside of that year.

Another shortcut you can use is that you can omit the year when you are typing in a date, and it will assume it is for the current calendar year. So for instance if your date format is MM/DD/YYYY, and you want to enter January 31, you can type in just 1/31, and **Tab** or click out of the field, and it will add the year portion.

If you are doing [Fiscal Year Data Entry and Receipting](#), it will similarly add an appropriate year number within the current fiscal year to years entered as only a month and day. So again if your date format is MM/DD/YYYY, your fiscal year start is June 1, you are in the 2015/2016 fiscal year, and you enter 1/31, it will be changed to 01/31/2016, but if you enter 12/31, it will be changed to 12/31/2015.

### **Entering Categories and Cheque # / Paid By**

The Donation Category field, Donor Category 1 and 2 fields, and Donation Cheque # / Paid By field, all use a method that is often called "**autocomplete**", as well as allowing you to use the mouse to drop down the list and select from it, or the up and down arrow keys to select values on the list.

Autocomplete allows you to type in a letter or letters that are the initial part of the value you want to select and have the rest appear. For example for the Cheque # / Paid By field, type in "M" for MasterCard or "Mo" for Money Order - use enough to make it distinct. As you type, the first match from the drop-down list that starts with what you have typed will appear, with the part you haven't typed highlighted. When you see the desired value, just go on to the next field, or Save your changes if you are done with your entries.

### **Entering Fields with Drop-Down Lists of Values that you cannot Type in**

There are some fields with drop-down lists, such as the Receipt Style / Location field in the **Maintenance** ⇒ **Receipt Options** [window](#), that you cannot entirely type in.

However, as well as being able to use the mouse to drop down the list and select from it, or the up and down arrow keys to select values on the list, you can also press the first letter of your desired value. That will select the first value on the list that starts with that letter. Pressing the same letter repeatedly will select successive values that start with that letter.

### **Selecting Donors from the Donor List**

For selecting a donor from the Donor List on the main window, you can search by last name or by member / envelope number (if you use them) easily. When the focus is in the Donor List (which is most of the time when you aren't editing a donor or donation), just start typing the last name, and it will immediately go to the donor whose name starts with what you have typed. What you are typing appears below the Donor List, beside the text "Find Name / #:". (This method does not support accented characters, however.)



For searching by member / envelope numbers, just type the number and it will go to the donor with that number. **Note:** If you have a donor with (say) member / envelope number 1 and another with number 10, then when you type the 1, it will go to the donor with number 1. When you type the 0 (making the displayed number 10) it will then move to the donor with number 10.

You can also move up and down the Donor List with the up and down arrow keys and PgUp / PgDn.

For further details, and a way to find donors by more criteria, or with accented characters near the start of their last name, see [Finding a Donor](#).

### **Using Underlined Letters in Menus and Buttons**

If you see an underlined letter in a main menu option (such as File) or a button (such as Save), that means that you can activate that menu or button by holding down Alt and pressing the letter. For example Alt+F for File, Alt+S for Save.

In drop-down menu options, such as the options on the File menu, when there is an underlined letter, just press that letter when the menu has been displayed and the option will be selected. So, for instance to select One Date Batch Entry from the File menu, press Alt+F for File, then O for One Date Batch Entry. (It doesn't have to be a capital "O".)

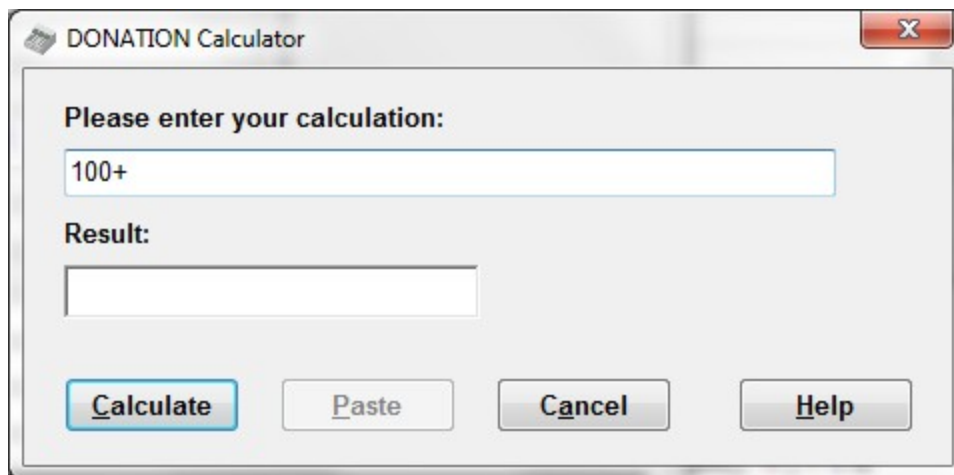
If you are using any recent version of Windows, the default setting may be that you cannot see these underlined letters in menus or buttons unless you press and hold the Alt key. So, one option is to first press Alt so that you can see the underlined letters, then you can use the letter. (They work whether you can see them or not, however.)

In Windows 10, search on "Underline", and select what comes up ("Underline access key shortcuts in menus when available"). The window that comes up should be scrolled to the heading "Change how keyboard shortcuts work". Make sure the selector for "Underline access keys when available" there is set to On.

## **7.3 Calculator for Amounts**

In many fields in the program in which you can enter a currency amount, you can pull up a calculator by typing an arithmetic operator in the field. Those operators are + for addition, - for subtraction, / for division, and \* for multiplication. Entering a left parenthesis, (, also pulls up the calculator, because parentheses can be used for grouping. The only exception to this happening is if the first character in the field is a minus sign, which of course is used to indicate a negative number.

When you do that, the following window will come up, filled in with that you have typed so far in the amount field:



This example would come up if you had typed exactly "100+" in a field.

At this point, just type the rest of any desired calculation in the field at the top, and click **Calculate** or press **Enter** to see the results of the calculation in the Result field. If that was successful, the **Paste** button becomes enabled, and you can click it or press **Enter** to paste that Result value back into the field in the window you came from.

Click **Cancel** or press **ESC** to abandon this window without pasting anything back.

#### Some Example Calculations

100 \* .08

100 / 4

100 + 35

100 \* (3 + 4)

Note that in that last example, the parentheses (brackets) are used to indicate that the addition should be done first, before the multiplication. Normally multiplications and divisions are done first, before additions or subtractions, if parentheses are not used. So, 100 \* 3 + 4 would evaluate to 304, whereas 100 \* (3 + 4) evaluates to 700.

Spaces are never required - they are just used in the examples above to make them easier to read.

## 7.4 Testing the Program Out

When you first install the program, you will probably want to test it out to see whether it really suits your needs. This will probably involve at least entering one or more donors, one or more donations for them, and generating sample receipts. There are a few possible strategies for doing this.

1. Real Data, Sample Receipts: Enter real data (categories, donors and donations) for the current year (the first year you would really want to generate receipts for using

DONATION). When you come to print the receipts, use the **Receipt = Current Donor Sample** menu option, so that only a sample receipt is generated for the currently selected Donor, and the receipt information is not saved back to the database. If you are satisfied with the program, just continue working on the real data (you don't have to delete anything). This is probably the simplest way to test the program. **Note:** Until you have paid and requested, received and installed a License Key for DONATION, you cannot create real receipts anyways, unless you are using the free [Lite](#) version.

2. Fake Data, Sample Receipts: Enter completely fake data. When you come to print the receipts, use the **Receipt = Current Donor Sample** menu option, so that only a sample receipt is generated for the currently selected Donor, and the receipt information is not saved back to the database. When you are satisfied, delete all of the data you have entered, using the **Database = Delete All Data** [menu option](#). (However, note that this deletes your initial Organization Info and Categories as well as Donors and Donations - you will have to re-enter everything.)
3. Fake Data, Real Receipts: Enter completely fake data, and generate real receipts if you like. Then, when you are done, delete all of the data you have entered, using **Database = Delete All Data**. (We don't really see any advantage of this over the previous option, however.)

## 7.5 Glossary

This page will give some definitions of terms used in the DONATION program, as well as other similar terms that may be used by some of the program's users, for reference.

Please [contact us](#) if you run into any terms used in the program, or in this help file, that do not appear here, for which you would find a definition helpful.

**Advantage:** For Canadian receipting, a donation with an "advantage" is one where the donor receives something of significance in exchange for what they give. For instance, at a fund-raising dinner, the value of the dinner is the "advantage", and only what they donate beyond that amount is eligible to be deducted on their taxes. This situation is also called "split receipting", because the total amount given is split between the advantage, which is not eligible for a tax deduction, and the remaining tax-deductible amount. See [Donations and Receipts with Advantage](#) for details.

**Backup:** A backup of your database is a file with a complete copy of all of the information in the database. You should make backups regularly, off of your computer's hard drive (in case the computer dies!) so that you can recover if anything happens. See [Backups](#).

**Batch Entry:** A quicker method for entering a large number of donations for the same date, particularly used by churches for Sunday (or other day) collections. See [Entering Multiple Donations for One Date](#).

**Bitmap:** A bitmap file is a graphical file that contains an image. For DONATION, the bitmap files that you can use are to specify a [logo and a scanned signature](#) for use on your receipts.

**Client:** In the [Local Network Version](#) of DONATION, a computer running the Local Network Client Version of DONATION (can also refer to that program itself). That computer accesses the database on the computer running the Local Network Server Version of DONATION. (That

computer can also be called the server, although it doesn't have to be running an actual server version of Windows).

**Contribution:** Another name that some organizations use for what is always called a "donation" in this program.

**Contribution Statement:** Another name, commonly used in the U.S.A., for what the program calls "receipts" - the document you send to donors to use for tax deduction purposes.

**Database:** The file on your computer that contains all of your data that you enter in the DONATION program, such as the donors and donations. If you use DONATION to track information for more than one organization, you may have more than one database - see [Switching Databases](#). The database is normally found in Data subdirectory of the program's [Data Directory](#).

**Database Software:** Almost all programs that have a database have some underlying 3rd party database software that manages the data for them. In DONATION, the Firebird SQL database software is used.

**Donation:** Any money that any person or organization gives to your organization is considered to be a donation, for the purposes of this program, even if it is something that would normally be called something else, such a membership fee, a grant, etc. Not all "donations" are eligible for charitable receipts though - see [Non Receiptable Donors and Donations](#) for how to handle ones that aren't. Since the ultimate primary purpose of DONATION is creating charitable receipts, you may or may not choose to record certain other types of income, such as grants, in it.

**Donation Category:** A purpose that donors donate for, such as General (for donations for unspecified purposes), Building, Library, etc. See [Donation Categories](#).

**Donor:** Any person or organization whose information you want to record in the program, whether or not they give any money to your organization, is called a "donor" for the purposes of this program.

**Donor Category:** A classification of your donors (as opposed to of the donor's donations), such as for any organization that has memberships, "Member" or "Attender". See [Donor Categories](#).

**Filter:** The program allows you to apply a "filter" to reports and in various other places. A filter is a rule based on the database fields included in that report, which causes the report to be restricted to only include the rows that match that rule. For instance, in some reports the filter "amount > 100" would eliminate all rows where the displayed donation amount was less than or equal to \$100, only retaining those rows where it was over \$100 in the report. See [Filtering Reports](#).

**Fiscal Year:** The 12-month period that your organization's primary financial reporting covers. For instance, if your financial reporting generally goes from June 1 of one year to May 31 of the next year, that is your fiscal year. See [Fiscal Years in DONATION](#).

**Gifts in Kind:** A gift in kind is any donation to your organization that is not cash (or a cash equivalent like donations by cheque, credit card or debit card). For instance, donations of

clothing, a TV, or a painting would all be gifts in kind. For Canada, DONATION has special features for the special receipting needed by the Canada Revenue Agency for [Gifts in Kind](#).

**License Key:** Two lines of letters and numbers that Software4Nonprofits provides to you after each payment, which get installed into the program. You request the key from the [Evaluation and Licensing](#) window. The license key encodes both your exact organization name and the expiry date of your eligibility for email support and upgrades (generally one year after each payment). Your initial license key after you first purchase the program converts it from the evaluation version to the full version. License keys are not used or needed by the free [Lite version](#).

**Mail Merge:** This refers to the process of taking a template document, which you can edit, and merging information from the database, such as donor, donation and receipt information, into it. The template document includes codes indicating what data is to be inserted to replace each code. Both [letters](#) and [receipts](#) can be created by mail merging.

**Member:** Some organizations track members. For the purpose of this program, a member is just an instance of a donor. DONATION has no special features or concepts to handle membership, but you can use things like donor categories to note whether a given "donor" is a member, and you could track membership fee payments (which may not be tax receiptable) with donations.

**Offering:** Another name that some organizations, particularly churches, use for what is always called a "donation" in this program.

**Organization:** Each organization (such as a charity, church or other non-profit) that you track donors and donations for in the program will have its own database. See [Switching Databases](#).

**PDF:** Stands for Portable Document Format. PDF is a standard file format for documents, that is normally not editable (without special programs like Adobe Acrobat), and is thus a good choice for distributing things like reports and receipts to other people in your organization or your donors. PDF files can also be made entirely non-editable by applying a secret password that is required to edit them - that is done with the official receipts in the program, when you email them.

**Pledge:** An undertaking by a donor to give a certain amount of money in the future, either once, or on some sort of schedule. See [Pledges in DONATION](#).

**Receipt:** While some organization refer to any donation as a "receipt", in this program the word "receipt" is used only to refer to the official document that you print and mail, or email, to your donors, for use on their taxes. This is also called a "charitable receipt", "tax receipt" or in the U.S.A. "contribution statement". See [Generating Charitable Receipts](#).

**Server:** In the [Local Network Version](#) of DONATION, a computer running the Local Network Server Version of DONATION (can also refer to that program itself). That computer has the actual database on it. (That computer doesn't have to be running an actual server version of Windows). Other computers, running the Local Network Client Version of DONATION, access the database that is on the server computer.

**Sort:** To sort a report or other displayed data set means to rearrange the rows in it, to order them based on one of the fields in the report. For instance, you might sort on a name (in

alphabetical order) or a donation amount. Sorts can be in increasing order (the normal order) or decreasing order. For amounts, decreasing order puts the highest amounts at the top of the report. See [Sorting Reports](#).

**Split Receipting:** See [Advantage](#) above.

**SQL:** Stands for Structured Query Language. SQL is the programming language used by most major databases, including things like Microsoft SQL Server and Oracle. It is used by the Firebird SQL database software included with DONATION. While you do not need to know SQL at all to use almost all aspects of DONATION, it is possible to use it for data retrieval through the **Database ⇒ Switch Databases** [window](#).

**Statement:** Any document other than an official charitable receipt that is given to a donor to show what they have donated over some period of time. See [Statements and Receipts](#).

## 8 THE MAIN MENU

### 8.1 The Main Menu

The main menu on the program's main window has the following choices:

<a href="#">File</a>	Creating new donors or donations, saving etc.
<a href="#">Maintenance</a>	Assorted functions for maintaining data other than donors and donations, changing the processing year, etc.
<a href="#">Letters</a>	Creates mail merge letters or receipts for one or all (or some) donors.
<a href="#">Reports</a>	Creates all reports on donors, donations, receipts and categories, including mailing labels for donors or for receipts
<a href="#">Receipt</a>	Printing charitable receipts, including duplicates
<a href="#">Database</a>	Various database maintenance tasks, including importing data, verifying your database etc.
<a href="#">Backup/Restore</a>	Making backups of your database, and restoring backups.
<a href="#">Tools</a>	Various helper tools for the program, including requesting license keys and upgrading the program.
<a href="#">Help</a>	Viewing the Help contents and index, the version number and contact info for this program, contacting Software4Nonprofits, etc.

The following sections explain the options on each of these main menus.

### 8.2 The File Menu

- New Donor** Choosing this menu option (or pressing **F3**, or using the **New (F3)** button above the Donor Details area) creates a new empty donor. You then [fill in the details](#) in the Donor Details area of the screen, then click **Save** (or press **F10**).
- Edit New Donation** Choosing this menu option (or pressing **F2**) moves you into the blank line displayed in the Donation Details area for [entering a new donation](#) for the currently selected donor. Again, you fill in the details in the Donations area of the screen, then click **Save** (or press **F10**).
- Save Changes** Only available when you have been making changes to a donor or donation, it saves those changes (same as the **Save** button or **F10**).
- Cancel Changes** Only available when you have been making changes to a donor or donation, this undoes those changes (same as the **Cancel** button or **ESC**).
- Find Donor** [Find a donor](#) matching a given name (same as **Ctrl+F**). Note that you can also find donors without this function, by just typing the first letters of the desired donor's last name, or their member/envelope number, when the focus is on the Donor List.
- Next Higher Member/Env.#** If the Member/Env. # (member or envelope number) field of the Donor Details area is visible and is currently blank, this menu option is enabled. It will enter the next higher number (after the last one that has been used) into that field. You can also do the same thing by right-clicking



in that field and selecting **Next Higher Member/Env. #** from the popup menu.

**Lowest Unused Member/Env.#** If the Member/Env. # (member or envelope number) field of the Donor Details area is visible and is currently blank, this menu option is enabled. It will enter the number that is the first gap in the sequential numbering (or 1 if that hasn't yet been assigned to any donor) into that field. You can also do the same thing by right-clicking in that field and selecting **Lowest Unused Member/Env. #** from the popup menu.

**Note:** Both of the previous menu options obey the setting for the "Lowest Member/Env. # for automatic assignment" on the Donor tab of the **Maintenance ⇒ Main Window Options** [window](#).

**Send Email** If the Email Address field of the Donor Details area displayed, and currently contains an email address, this menu option is enabled. It will bring up an email in an email window, addressed to that email address. (This requires you to have [configured email sending](#) in the program with **Maintenance ⇒ Email Sending Configuration**.) You can also activate this option by right-clicking on an email address and picking **Send Email** from the popup menu.

**Edit Comments** This will bring up a new window in which to edit the Comments for the Donor. (It is sometimes hard to edit longer comments in the small space available for them on the main window.) You can also activate this option by right-clicking on a Donor's Comments field, and picking **Edit Comments** from the popup menu.

**Print Setup** Pulls up a standard Print Setup dialog box, which lets you select which printer to print to for reports etc., and if necessary, modify the detailed setup of the current printer by clicking the "**Setup ...**" button.

**Exit** Exits the DONATION program (same as pressing **Alt+F4** or using the "X" in the top right-hand corner of the window).

## 8.3 The Maintenance Menu

**Organization Info** Edit the name, address and charitable number of your organization, etc. For more information see [Editing Organization Info](#).

**Main Window** Edit a number of options for the Donor Details area (including the **O** names for the six customizable Other Info fields), the Donations area, **p** plus options for Limited Users if you choose to use a Limited User **t** password as well as a normal Program Entry password. For more **i** information see [Editing Main Window Options](#).

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**n**  
**s**

**Receipt Options** Specify various options for the print format of the charitable receipts, including whether you want Canadian (English) receipts, Bilingual (French/English) receipts, French-only receipts, U.S. receipts or

ones for Australia or other countries. For more information see [Editing Receipt Options](#).

### Email Sending Configuration

Set up the settings to allow the DONATION program to send emails. (These are your SMTP settings.) For more information see [Email Sending Configuration](#).

### Donation Categories

Allows you to enter various categories for donations. See [Donation Categories](#) for details.

### Imported Category Conversions

Allows you to make changes to [conversions](#) of donation category names imported from various sources via several windows in the program, which have been matched to existing donation categories in the program. For instance, an imported value of "Library Donations" might have been converted to match an existing category just called "Library".

### Donation Paid By Values

Allows you to edit the list of built-in values displayed on the drop-down list for the Cheque # / Paid By field. (You can also type anything you want into that field, however, not just the values listed in this menu option's window.) See [Donation Paid By Values](#) for details.

### Recurring Donations

Allows you to view, edit and delete memorized [recurring donations](#).

### Donor Category 1

Allows you to edit one of two possible distinct lists of categories for donors. See [Donor Categories](#) for details. If you set the Category 1 Label or Category 2 Label to something different in **Maintenance ⇒**

### Donor Category 2

**d Main Window Options** the names of these menu options will change to include that new label.

### Current Donor

Allows you to view, enter and edit [communications](#) records for the currently-displayed donor.

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### Groups / Committees

Allows you to specific a list of Short Names and Full Names for [groups or committees](#) within your organization that a donor can be a

member of. Once this is set up, you can specify which ones each donor is actually a member of.

### **Configure Bank Deposits**

Allows you to configure whether you are preparing your bank deposits in DONATION, and if so, which accounting software program you will be exporting transactions to. See [Configuring Bank Deposits](#) for details.

### **Create Bank Deposit**

Allows you to [create a new bank deposit](#) by selecting which cash, cheque etc. donations are included in it, or retrieve a previously saved bank deposit. On the same window, you can print a report on that bank deposit, and export it to an import file for Software4Nonprofits ACCOUNTS or Intuit QuickBooks Desktop.

If you have configured to use [Abundant](#) online donations, this menu is split into two sub-menu options:

- **Cash and Cheques** (or **Cash and Checks** for users in the U.S.A.) which handles regular donations
- **Abundant Donations** which confirms the totals, prints reports and exports accounting transactions for batches of donations imported from Abundant.

### **Count Cash**

Brings up a window that allows you to count and total coins and bills.

### **Setup Abundant Online Donations**

Does the initial setup of an account and its configuration for accepting [Abundant](#) online donations, and integrating them into DONATION.

### **Abundant Configuration Web Pages Sub-Menu**

Contains sub-menu options **Giving Forms, Gifts, Batches, Scheduled Gifts, Accounts, Funds, and Settings**. Each of those goes to the appropriate setup page for that aspect of your Abundant online donation system. These can only be used after all of the initial setup steps (under **Setup Abundant Online Donations**) have been completed.

### **Date Formats**

**This menu option is only present for users of the OnDemand Version.** See [OnDemand Date Formats](#) for details.

### **Change Year**

Used to change the year of the data you are working on to an earlier or later year. If there is no data for the year you are changing to so far, you are given an option to copy donors and categories from the current year to the new year. See details under [Year End Procedures](#) and [Changing Years in the Database](#).

### **Administer All Users**

**This menu option is only present for users of the OnDemand Version.** See [OnDemand User Management](#) for details.

### **Change Password Sub-Menu**

See [Passwords](#) for details of most of the following sub-menu options, where other more-specific links aren't given.

In the [OnDemand Version](#), only the **Receipt Password** option below is available - the limitations enforced by the other passwords are instead determined by the permissions given in the **Maintenance ⇒ Administer All Users** [window](#) for the OnDemand Version. All of the other options below are omitted.

<b>Program Entry Password</b>	Set or change the password used to get into the program. You can remove the password by leaving the New Password fields completely empty.
<b>Limited User Password</b>	Set or change the password used by Limited Users to get into the program. For more details on Limited Users, see <a href="#">Using a Limited User Password</a> .
<b>Read Only Password</b>	Set or change the password for read-only users. Such users can view data and reports, and create letters etc., but not change any data, generate receipts (other than sample ones) etc.
<b>Receipt Password</b>	Set or change the password required before you can generate receipts. (This can be used to provide added security in terms of who can generate receipts.) If this is not set, users who enter with the Program Entry Password (or all users, if that is not set) can create receipts.
<b>Internet Backup Encryption Password</b>	Set or change the password used to encrypt <a href="#">Internet Backups</a> , which is also used for the <a href="#">Cloud Storage Service</a> . As long as you have not set up a Read Only or Limited User password, this can be the same as the Program Entry Password, as long they both satisfy the stricter requirements for Internet passwords.
<b>Donors Only Password</b>	Set or change the password for users who can only see and change donor information, no financial information (donations, receipts, pledges, etc.). See <a href="#">Using a Donors Only Password</a> .

## 8.4 The Letters Menu

<b>One Letter</b>	Allows you to merge donor, donation or receipt information for the currently selected donor into a <a href="#">letter</a> .
<b>Mass Mailing</b>	Allows you to merge donor, donation or receipt information for all donors (or a <a href="#">filtered</a> subset) into a <a href="#">group of letters</a> .
<b>Email Donors</b>	Allows you to send the same <a href="#">email</a> (optionally with a PDF attachment) to all or filtered donors with email addresses.
<b>Mail Merge Training Videos on the Web</b>	Takes you to the <a href="#">Demos and Samples</a> page on the program's web site, which contains several videos on how to use the options on this menu for creating mail merge letters and receipts.

For more information on how to use the Letters menu options, see the section on [Creating Mail Merge Letters](#) and [Emailing Newsletters](#).

## 8.5 The Reports Menu

Note that unless specified otherwise, all reports show data only for the current working calendar year in the program, as selected with the **Maintenance** ⇒ **Change Year** option.

If you are in a country like the United Kingdom, Australia or New Zealand and are [Using Fiscal Year Data Entry and Receipting](#), and you are in a year that has been converted to fiscal year data entry, most reports that normally operate on calendar years change to operate on your current fiscal year instead.

There are two ways to select the built-in reports:

- with the **Report Browser**, which allows you to select from a tree of reports, and see descriptions for them before you run them, or
- with the Donor, Donation, One Date Donation, Receipt, Category and Fiscal Year sub-menus or menu options of the **Reports** menu.

Both of these ways include all of the same built-in reports. The Reports Browser is better for learning which reports are available, and what they do, whereas the sub-menus are better for quickly selecting a report when you already know which one you want.

The following links go to Help pages about each of the items on the Reports menu. The pages for the report sub-menus include descriptions for each report (basically the same descriptions that you can see in the Report Browser).

### [Using the Report Browser](#)

The Reports ⇒ [Donor Sub-Menu](#)

The Reports ⇒ [Donation Sub-Menu](#)

The Reports ⇒ [One Date Donation menu option](#)

The Reports ⇒ [Bank Deposit Sub-Menu](#)

The Reports ⇒ [Pledge Sub-Menu](#)

The Reports ⇒ [Receipt Sub-Menu](#)

The Reports ⇒ [Category Sub-Menu](#)

The Reports ⇒ [Fiscal Year Sub-Menu](#)

The Reports ⇒ [Administrative Sub-Menu](#)

### [Creating Custom Reports](#)

### [Memorized Reports](#)

The **Donor** sub-menu contains reports that are either per-donor, or that show groupings of donors (for example totals by donor categories). They may contain donation information, but they will be totalled by donor.

The **Donation** sub-menu contains either reports that list individual donations, or that summarize donations by their categories.

The **One Date Donation** report lists details and/or summary information about the donations entered for just one date and optionally a named [Batch Entry](#).

The **Pledge** sub-menu contains reports on one or all donors' pledges and payments on those pledges. Varying numbers of reports are shown, and the reports have varying contents, depending on the type of pledging you have selected in the [Pledges tab](#) of the **Maintenance** ⇒ **Main Window Options** window. And this sub-menu is removed entirely if you have chosen

not to display the Annual Pledge field, in the [Donor tab](#) of **Maintenance ⇒ Main Window Options**.

The **Receipt** sub-menu contains reports on receipts that have been issued.

The **Category** sub-menu contains reports that list your donor and donation categories.

The **Fiscal Year** sub-menu contains reports based on your [fiscal year](#), if you have set that up to differ from the calendar year, in the **Maintenance ⇒ Organization Info window**. If you have not set up a fiscal year, these reports are not available. They are also not available if you are [Using Fiscal Year Data Entry and Receipting](#), and you are in a year that has been converted to fiscal year data entry, because the normal reports are then automatically fiscal year reports, so these are not required.

The [Custom Reports](#) option allows you to create simple custom reports by picking columns from lists.

The [Memorized Reports](#) option allows you to re-run reports memorized from the report viewer or from Custom Reports (or ones created directly via the **Database ⇒ SQL Select menu option**).

**Note:** if you have selected not to show the field Member/Env. # in the Donor Details tab of **Maintenance ⇒ Main Window Options**, several reports on the **Reports ⇒ Donor, Donation and Fiscal Year** sub-menus that specifically include that field will not be shown, since they are not relevant if you aren't using that field.

## 8.6 The Reports -> Donor Sub-Menu

This page lists all of the options on the **Reports ⇒ Donor** sub-menu. They can also be run by using the [Report Browser](#) and drilling down into the DONOR REPORTS.

Like almost all other reports, they can be run from an automated [reports script](#). Instructions for the arguments needed to do so from a reports script are included below the description of each report. The `Name=` argument for each one is always taken from the choices you drill-down through to find that report in the Report Browser.

- |                      |  |
|----------------------|--|
| <b>Donation Info</b> | <p><b>Sort by Name:</b> Lists all donors in the current and prior years, with their donation totals and donor categories for each year. Includes all donors, whether or not they have donations in either year. You are prompted for a range of dates to restrict this report to, and optionally a category.</p> <p><b>Sort by Amount:</b> Lists only donors in the current and prior years who have given a donation in one of those years, with totals of those donations, sorted by this year's donation totals, in descending order. You are prompted for a range of dates to restrict this report to, and optionally a category.</p> <p><b>Sort by Member/Envelope #:</b> Lists all donors in the current and prior years, with their donation totals for each year, in order by Member/Envelope number. (Those with such a number all come before those without one, who are then sorted by name.) Includes all donors, whether or not they have donations in either year. You are prompted for a range of dates to restrict this report to, and optionally a category.</p> <p><b>Last 4 Years:</b> Gives totals for each donor for each of the last four years,</p> |
|----------------------|--|

plus a grand total for each donor for all four years. Only includes donors who have given in at least one of those years. Sorted by Name, but you can use the **Sort** button to [change the sort](#).

**Note:** Prior to version 3.42 of DONATION, all of these reports omitted any donors that were present in the previous year's donor list but had been deleted from the current year's donor list (or never copied forward to the current year). That has now been corrected, so that they are included. The same applies for the **Last 4 Years** report - any donor present in any of the last 4 years' donors lists will now be included, if they have any donations in any of those years.

For all of these reports, you can drill-down on total fields for donations to see a detail report of the donations that make up that total.

To run any of these from an automated [reports script](#), the arguments to RunReport() are:

Name= Donor Reports -> Donation Info -> (then the name of the report as listed above)

Then except for Last 4 Years, that doesn't prompt for anything:

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

Category= (All, or a donation category name)

## Addresses

Lists the name, address, phone number and email address of all donors. Although the following fields are not displayed on the report, it can be filtered on any of the two donor category fields, the Groups field, or the six other info fields, or the total amount donated field.

To run this from an automated [reports script](#), the sole argument to RunReport() is:

Name= Donor Reports -> Addresses

## Addresses by Member/

**Envelope Number** Same as the previous report, but also adds the Member/ Envelope Number, and sorts numerically by it. Although the following fields are not displayed on the report, it can be filtered on any of the two donor category fields, the Groups field, the six other info fields, or the total amount donated field.

To run this from an automated [reports script](#), the sole argument to RunReport() is:

Name= Donor Reports -> Addresses by Member/Envelope Number

**Contact Information** Lists the name, phone number and email address for all donors, or only for donors with donations within a specified range of dates. It can be filtered on any of the two donor category fields, the Groups field, the six other info fields, or the total amount donated field (within any specified range of dates), although none of those fields are printed on the report.

To run this from an automated [reports script](#), the arguments to



RunReport() are:

Name= Donor Reports -> Contact Information

Recipients= All, or ForDateRange

If Recipients is ForDateRange, include DateRange=, or  
StartDate= and EndDate= (see [here](#) for more details)

**Customer IDs** Lists the name, phone number and email address for all donors, along with their Customer IDs, for all Customer IDs entered via the IDs button on the main window, or during imports.

**Note:** This report only appears on the menu if you have turned on the maintenance and use of Customer IDs by checking the Customer IDs checkbox on the [Donor Details tab](#) of **Maintenance** ⇒ **Main Window Options**.

To run this from an automated [reports script](#), the sole argument to RunReport() is:

Name= Donor Reports -> Customer IDs

## Recorded

**Communications** Lists all fields for automatically or manually recorded [communications](#) except for the Comments field. You are prompted for whether to report on All Donors or just the Current Donor, and for a range of dates of communications to include.

**Potential Duplicates** Lists donor names which may be duplicates of each other, based on a "sounds-like" rule. This should be run periodically to check for donors that may have been entered twice. However, some duplicate entries with spelling errors may not be caught by this report, and it will definitely print names that are not duplicates of each other, but just sound alike.

**Warning:** Because this report has to compare every donor to every other donor, if you have a lot of donors, this can take a long time to run (many minutes).

If you do find real duplicates with this report, you can [merge](#) them with **Database** ⇒ **Merge Duplicate Donors**.

To run this from an automated [reports script](#), the sole argument to RunReport() is:

Name= Donor Reports -> Potential Duplicates

**Actual Duplicates** Lists donor names which may be duplicates of each other, based on being exactly the same, except possibly for differences in capitalization. This should be run periodically to check for donors that may have been entered twice. Note: duplicate entries with spelling errors will not be caught by this report.

**Warning:** Because this report has to compare every donor to every other donor, if you have a lot of donors, this can take a long time to run (many minutes).

If you do find real duplicates with this report, you can [merge](#) them with **Database** ⇒ **Merge Duplicate Donors**.

To run this from an automated [reports script](#), the sole argument to

RunReport() is:

Name= Donor Reports -> Actual Duplicates

### **Duplicate Member/**

**Envelope Numbers** Lists donor names with duplicate Member/Envelope Numbers. While this should not be able to happen, it can happen in some exceptional circumstances, and should be fixed. A message at the bottom of the report explains how to fix any duplicates that are found.

To run this from an automated [reports script](#), the sole argument to RunReport() is:

Name= Donor Reports -> Duplicate Member/Envelope Numbers

### **Mailing Labels**

Prints mailing labels for all donors, only for the currently selected donor, or only for donors who have donations within a specified range of dates. See the section on [Mailing Labels](#) for details on the types of labels available. You can also select to skip labels for donors with email addresses. It can be filtered on any of the two donor category fields, the Groups field, the six other info fields, or the total amount donated field, although none of those fields are printed on the labels.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Donor Reports -> Mailing Labels

Recipients= All, CurrentDonor or ForDateRange

If Recipients is ForDateRange, include DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

SkipDonorsWithEmail= Y or N

Size= 2up or 3up (2up is the 4" x 1" labels, 3up is the 2.625" x 1" labels)

### **Mailing Labels with Member/Envelope #**

Prints mailing labels for all donors, only for the currently selected donor, or only for donors who have donations within a specified range of dates, with the Member/Envelope # included on the top line with the name. Only available in 4" x 1" labels. See the section on [Mailing Labels](#) for details on this type of label. You can also select to skip labels for donors with email addresses. It can be filtered on any of the two donor category fields, the Groups field, the six other info fields, or the total amount donated field, although none of those fields are printed on the labels.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Donor Reports -> Mailing Labels with Member/Envelope #

The other arguments are as for Mailing Labels above, except omitting the Size argument (they are always 2up).

**Envelope Box Labels** Prints labels for all donors, with just "Envelope # ..." (the actual number instead of "...") and the name. These can be put onto the box of

envelopes for that donor. Only available in 4" x 1" labels. See the section on [Mailing Labels](#) for details on this type of label.

To run this from an automated [reports script](#), the sole argument to RunReport() is:

```
Name= Donor Reports -> Envelope Box Labels
```

## Envelopes

Prints donors' names and addresses on standard #10 envelopes, for all donors, only for the currently selected donor, or only for donors who have donations within a specified range of dates. See the section on [Envelopes](#) for further details. You can also select to skip envelopes for donors with email addresses. It can be filtered on any of the two donor category fields, or the six other info fields, or the total amount donated field, although none of those fields are printed on the labels.

To run this from an automated [reports script](#), the arguments to RunReport() are:

```
Name= Donor Reports -> Envelopes
Recipients= All, CurrentDonor OR ForDateRange
If Recipients is ForDateRange, include DateRange=, or
StartDate= and EndDate= (see here for more details)
SkipDonorsWithEmail= Y or N
IncludeOrganizationNameAddress= Y or N
IncludeLogo= Y or N
```

**Category 1 Totals** Lists the donation amounts totalled by Donor Category 1 and subtotalled by Category 2.

The name of this report can change, if you have changed the name of the donor Category 1 field, with an entry on the Donor Details tab of the **Maintenance ⇒ Main Window Options** window. For instance, if you change it to "Membership", the name of this report becomes "Membership (Category 1) Totals".

To run this from an automated [reports script](#), the sole argument to RunReport() is:

```
Name= Donor Reports -> (then the displayed name of the
report, as explained above)
```

**Category 2 Totals** Lists the donation amounts totalled by Donor Category 2 and subtotalled by Category 1.

The name of this report can change, if you have changed the name of the donor Category 2 field, with an entry on the Donor Details tab of the **Maintenance ⇒ Main Window Options** window. For instance, if you change it to "Marital Status", the name of this report becomes "Marital Status (Category 2) Totals".

To run this from an automated [reports script](#), the sole argument to RunReport() is:

```
Name= Donor Reports -> (then the displayed name of the
report, as explained above)
```

**Old Donors** Lists donors that are present in this year or last year's list of donors that have not donated in either year, but did donate in previous years, with the date of their last donation and the total amount they have ever given.  
Note: If you have deleted old years' data with the **Database ⇒ Delete Old Data menu option**, that old data will be gone, and thus will not be included in the past years' total that is in this report. Also, donors that were present in the donor list 2 or more years ago, but have been deleted from (or never copied forward to) this year's and last year's donor lists, will not be included in the report.

To run this from an automated [reports script](#), the sole argument to RunReport() is:  
Name= Donor Reports -> Old Donors

**Non Donors** Lists donors that are present in this year's list of donors that have never donated, with the number of years they have been in the DONATION database.  
Note: If you have deleted old years' data with the **Database ⇒ Delete Old Data menu option**, that old data will be gone, and thus will not be included in the count of years that donors have been in the system that is in this report. Also, donors that were present in the donor list in previous years, but have been deleted from (or never copied forward to) this year's donor list, will not be included in the report.  
Sorted on the number of years the donors have been in the system, descending, then the name.

To run this from an automated [reports script](#), the sole argument to RunReport() is:  
Name= Donor Reports -> Non Donors

**Charity Donors** Lists donors that have their Charitable # field filled in (i.e. ones that are themselves charities), with their Charitable # and total givings for the year.

To run this from an automated [reports script](#), the sole argument to RunReport() is:  
Name= Donor Reports -> Charity Donors

## 8.7 The Reports -> Donation Sub-Menu

This page lists all of the options on the **Reports ⇒ Donation** sub-menu. They can also be run by using the [Report Browser](#) and drilling down into the DONATION REPORTS.

Like almost all other reports, they can be run from an automated [reports script](#). Instructions for the arguments needed to do so from a reports script are included below the description of each report. The Name= argument for each one is always taken from the choices you drill-down through to find that report in the Report Browser.

**All Donations** Reports on this sub-menu list all donations with their categories, one of **Sort by Name**, **Sort by Date** or **Sort by Amount**. You are prompted for a range of dates to restrict these reports to, and optionally a category.

If you are displaying the donation Description field (as set in the [Donations tab](#) of **Maintenance ⇒ Main Window Options**), the option **Sort by Date, with Description** is also available. It adds in the donation description field, which is not present in the other three reports. If you want this report sorted in a different order, use the **Sort** button after the report is displayed.

If you are displaying the donation Eligible Amount field (as set in the [Donations tab](#) of **Maintenance ⇒ Main Window Options**), the option **Sort by Date, All Fields** is also available. It adds in the donation description, eligible amount, and advantage description fields. If you want this report sorted in a different order, use the **Sort** button after the report is displayed.

To run any of these from an automated [reports script](#), the arguments to RunReport() are:

Name= Donation Reports -> All Donations -> (then the name of the report as listed above)

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

Category= (All, or a donation category name)

### Current Donor

Reports on this sub-menu list individual or summarized donations for just the currently displayed donor on the program's main window.

**Current Year Details** lists all donations for the current donor in the current working year, plus a summary by category.

**All Years Details** lists all donations for the current donor in all years.

**History (Annual Totals)** shows the total amount that the current donor has given in each year for which you have data in the database.

To run any of these from an automated [reports script](#), the arguments to RunReport() are:

Name= Donation Reports -> Current Donor -> (then the name of the report as listed above)

### Receipted

Lists all receipted donations, sorted by date then name. If you are showing the Eligible Amount field for donations, that is also included in this report. You are prompted for a range of dates.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Donation Reports -> Receipted

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

### Non-Receiptable / Pre-Receipted

Lists all donations that are not eligible to be included in a receipt, because their Category is "Non-Receiptable" or starts with "NR " or

ends with " NR", or their Cheque # / Paid By value is "Non-Receiptable" or "Pre-Receipted", or the donor's Category 1 or Category 2 value is "Non-Receiptable" or starts with "NR " or ends with " NR". If you are showing the Eligible Amount field for donations, that is also included in this report. You are prompted for a range of dates. Sorted by date then name. See [Non-Receiptable Donors and Donations](#) for more details.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Donation Reports -> Non-Receiptable / Pre-Receipted

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

### Unreceipted

Lists all donations that have not yet received a receipt but could receive one, sorted by name then date. (It omits any donations that are Non-Receiptable, and thus listed in the previous report) This can be used to identify missed donations that should be receipted if you are using **Receipt ⇒ Filtered Donors** rather than **Receipt ⇒ All Donors** to issue the receipts. If you are showing the Eligible Amount field for donations, that is also included in this report. For Canadian users, also shows which donations are missing Descriptions needed on the receipts (for Gifts in Kind, or donations with Advantage). This same report can also be accessed through the menu option **Receipt ⇒ Unreceipted Donations Report**.

To run this from an automated [reports script](#), the sole argument to RunReport() is:

Name= Donation Reports -> Unreceipted

Note: Between them, the previous three reports list all donations, if run for the entire year.

### Summary by Date and Category

Gives a summary by category of all donations, subtotaled by date, for a specified range of dates. This might be used to help reconcile with your accounting program.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Donation Reports -> Summary by Date and Category

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

### Summary by Category

Gives just a summary of all donations by their donation category. You may specify a range of dates to report on. This includes a count of the number of donations in each category, and the number of donors giving donations in each category. It also has a total at the bottom, labelled "Total Distinct Donors across all Categories", which is the total number of donors with donations. That is often different from the sum of the "# Donors" column that it appears underneath, because

some donors may have given in more than one category, so if the "# Donors" column had simply been summed, some donors would have been counted twice.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Donation Reports -> Summary by Category  
DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

**Summary by Paid By** Like Summary by Category above, but it is summarized by the value in the Cheque # / Paid By field for the donations, not by their Category. If a cheque number is entered into the Cheque # / Paid By field, either "Check" or "Cheque" will be used as the value to summarize on, depending on your location, as set in **Maintenance => Receipt Options**.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Donation Reports -> Summary by Paid By  
DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

### **Summary by Dollar Ranges**

Gives the counts and totals for the previous and current year of the donors whose total donations for the selected range of dates in that year are within certain dollar ranges, like \$0.01 - \$50, \$50.01 - \$100, etc. You are prompted for a range of dates to restrict this report to, and an optional donation category. You are also prompted with a window that allows you to [change the dollar ranges](#) used. The report shows the percentages of each year's totals that the counts and totals in each group form. Note: Only dollar ranges for which there are donors whose total donations are within that range are shown on the report. The report can be filtered to restrict it by values of the Member/Envelope #'s, the two donor categories, the Groups field, or the six Other Info fields.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Donation Reports -> Summary by Dollar Ranges  
DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

Category= (All, or a donation category name)

This report does not allow you to specify the specific the dollar ranges to use, when you run it from a script. It will use the last dollar ranges that you used when running the report normally from the Reports menu or Report Browser.

### **By Donor By Category**

Lists totals of donations for each donor, by category of donation, for both the current and the previous year. You can drill-down on total



fields for donations to see a detail report of the donations that make up that total.

To run this from an automated [reports script](#), the sole argument to RunReport() is:

Name= Donation Reports -> By Donor By Category

### **Details, One Page Per Donor**

Similar to the actual receipts - lists all donation details (including the Descriptions), plus a summary by category, for each donor, one page per donor. Prompts for a range of dates of donations. This could be used (for instance) to hand out quarterly reports on givings to donors. See [Statements and Receipts](#) for further discussion of how this can be done using this report or the next one, or via mail merge if you want to change the format. This report can also be sent to donors who have email addresses by email - see [Emailing Receipts and Statements](#) for details.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Donation Reports -> Details, One Page Per Donor

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

### **Category Totals, One Page per Donor**

Lists totals by donation category, for each donor, one page per donor. Prompts for a range of dates of donations. This could be used (for instance) to hand out quarterly reports on givings to donors. See [Statements and Receipts](#) for further discussion of how this can be done using this report or the previous one, or via mail merge if you want to change the format. This report can also be sent to donors who have email addresses by email - see [Emailing Receipts and Statements](#) for details.

To run this from an automated [reports script](#), the arguments to RunReport() are:

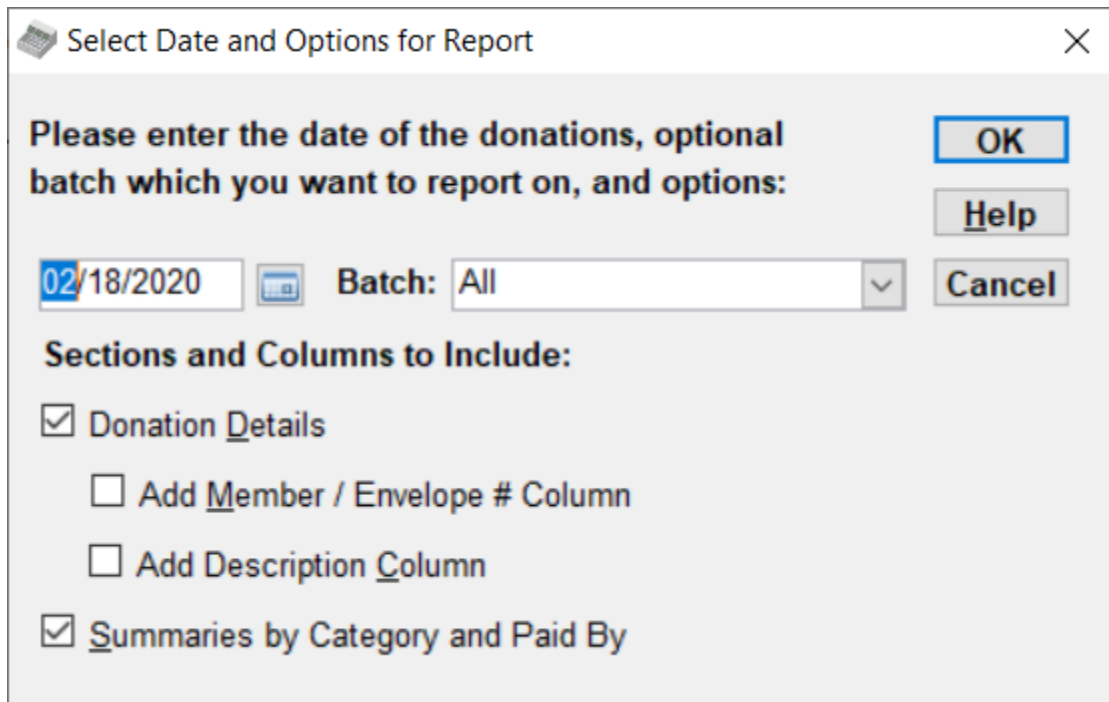
Name= Donation Reports -> Category Totals, One Page Per Donor

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

Note: The three One Date reports (Details, Details with Member/Envelope # and Summary) that used to be on this sub-menu were moved to the new **Reports = One Date Donation sub-menu** as of version 3.33, along with two new additional One Date reports. They were then consolidated into a single menu option, with a window for picking more specific options, as of release 4.31.

## 8.8 The Reports -> One Date Donation Sub-Menu

Prior to release 4.31, One Date Donation reports had their own sub-menu of options. However, with 7 options on that menu (and two more needed for missing variations of the report) it was confusing to pick what you needed. So, starting in release 4.31, we replaced that sub-menu with this single **Reports** ⇒ **One Date Donation** menu option, which brings up a window such as the following:



Select Date and Options for Report

Please enter the date of the donations, optional batch which you want to report on, and options:

02/18/2020 Batch: All

OK Help Cancel

Sections and Columns to Include:

- ☒ Donation Details
  - ☐ Add Member / Envelope # Column
  - ☐ Add Description Column
- ☒ Summaries by Category and Paid By

The reports generated from this window can be used as a paper backup of each day's entries after they are made, or to help with reconciling totals for that day's entries.

### Variations in the Window

Whether these reports prompt for a Batch depends on whether you have checked the **Use Batch Descriptions** checkbox on the Donations tab of the **Maintenance** ⇒ **Main Window Options** [window](#). For further details about that, see the Help on [Batch Entry](#).

If you have saved one or more batches with descriptions for the selected date, the Batch drop-down will default to showing the last-entered description. The drop-down list is in order of most recently entered first, with "All" at the bottom of the list to report on all donations for that date, whether or not they were entered as a batch with a Description via the Batch Entry window. (So, "All" will also include donations entered on the program's main window.)

The "Add Member / Envelope # Column" checkbox will not appear if you have chosen not to display that donor field via the checkbox on the Donor Details tab in the **Maintenance** ⇒ **Main Window Options** [window](#).

The "Add Description Column" checkbox will not appear if you have chosen not to display that donation field via the checkbox on the Donations tab of that window.

For [Limited Users](#), the "Add Member / Envelope # Column" checkbox is forced to be checked, and cannot be turned off.

### Running the Report

When you click OK, an appropriate report will run with the appropriate columns and sections. If a batch (other than "All") was selected, the report will be limited to only the donations in that named [Batch Entry](#).

The Donation Details section of reports (if included) always includes the Name (possibly omitted for Limited Users), Amount, Category and Cheque # / Paid By value of the donations. It may also include the two additional columns depending on your selections in the relevant checkboxes on the window above.

If you select only one of "Donation Details" and "Summaries by Category and Paid By", the report will have either a "Switch to Summary Report" button (if it was including only Details) or a "Switch to Details Report" button (if it was including only Summaries) at the bottom. Each button switches to the other type of report, as indicated in its name.

Reports that include Details and the Member / Envelope # column include two extra numbers at the bottom: "Checksum of Unique Member / Envelope #s" and "Checksum of Member / Envelope #s, including splits". These values are just the sum of all envelope numbers that appear in the report. However, the first one only counts an envelope number that appears multiple times once, while the second one counts it each time it appears. These values can be used as a double-check that you entered the donations for the correct donors when using One Date Batch Entry for donations, if you add the envelope numbers up with a calculator before doing your entries. (Generally each church that uses this technique uses only one of the two numbers.)

The Summaries only report, or reports that include both Details and Summaries, list totals by donation category of all donations entered with a given date and optionally specific batch or "All", as well as totals by "Paid By" of all donations on that date and optionally in that batch. In the second set of totals, all "Cheque # / Paid By" values that contain an actual cheque number are grouped together under the heading "Cheques" or "Checks". This can be used to make an entry into your accounting system, if you are not using the features for [Bank Deposits](#).

### Memorizing One Date Donation Reports

When you replay [memorized](#) One Date Donation reports, the options window will show up with the correct options selected matching the options chosen when you memorized it. All of the checkbox options will be greyed out so that they cannot be changed. That ensures that you are replaying the report with the same options that you originally memorized.

**Note:** Such reports memorized using exactly release 4.31 will likely not work properly, because they did not correctly memorize the desired options in the new options window. They will always try to replay the simplest Details-only report with no additional columns. Reports memorized in any earlier release or any later release should be fine.

### Running this from a Reports Script

You can also run all variations of this report from an [automated reports script](#). The arguments to RunReport() used to run this are:

Name= One Date Donation

Date=, which can be a named date or specific date in your computer's date entry format (see [here](#) for more details)

BatchDescription=, used only if you are using batch descriptions. If you are, likely you will enter "All" as the value here, since any given day's individual batch will likely have a unique description, which you could not know in advance to put into a script.

Include Details= Y or N, to specify whether to include the Donation Details section of the report

AddEnvelopeNumber= Y or N, to specify whether to include the donor's Member/Envelope number in the details section

AddDescription= Y or N, to specify whether to include the donation Description in the details section

IncludeSummaries= Y or N, to specify whether to include the Summaries by Category and Paid By sections of the report

## 8.9 The Reports -> Bank Deposits Sub-Menu

This sub-menu includes reports related to bank deposits that you have saved. These are all of the options on the **Reports = Donor** sub-menu. They can also be run by using the [Report Browser](#) and drilling down into the BANK DEPOSIT REPORTS.

Like almost all other reports, some of these reports can be run from an automated [reports script](#). Instructions for the arguments needed to do so from a reports script are included below the description of each report. The Name= argument for each one is always taken from the choices you drill-down through to find that report in the Report Browser. The ones that cannot be run from a reports script are indicated.

### Summary List

Lists all bank deposits that you have saved that include donations in the current year. The bank deposit date, bank account, number of included donations, minimum and maximum donation dates, and total amount are shown. You can click on the date in any row of this report to drill down to the One Deposit Details report for that deposit.

To run this from an automated [reports script](#), the sole argument to RunReport() is:

Name= Bank Deposit Reports -> Summary List

### One Deposit Details

Gives the detailed list of donations, and donation category and paid by totals, and the transaction for your accounting program, for one bank deposit that you have saved, with a specified bank deposit date. Prompts for you to select a specific bank deposit by date and bank account.

This report cannot be run from a reports script, because you would need to indicate a specific bank deposit, and so it would make no sense to have to create a script for that as opposed to just running it directly.

**One Deposit Slip**

Contains what needs to go on a bank deposit slip - a list of cheques, counts of coins and bills, and totals. Some banks may accept it in place of your deposit slip. Prompts for you to select a specific bank deposit by date and bank account.

This report cannot be run from a reports script, because you would need to indicate a specific bank deposit, and so it would make no sense to have to create a script for that as opposed to just running it directly.

**All Donations with Deposit Status**

Lists all donations for a specified range of dates, with their status:  
 - already being included in a bank deposit (with that deposit's date), or  
 - that they would be omitted from any new deposit (with the reason for that shown), or  
 -that they would be included in a new deposit.

To run this from an automated [reports script](#), the argument to RunReport() are:

Name= Bank Deposit Reports -> All Donations with Deposit Status

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

**8.10 The Reports -> Pledge Sub-Menu**

This page lists all of the options on the **Reports** ⇒ **Pledge** sub-menu. They can also be run by using the [Report Browser](#) and drilling down into the PLEDGE REPORTS.

Like almost all other reports, they can be run from an automated [reports script](#). Instructions for the arguments needed to do so from a reports script are included below the description of each report. The Name= argument for each one is always taken from the choices you drill-down through to find that report in the Report Browser.

Which Pledge reports are available varies, depending on the settings in the [Pledges tab](#) of **Maintenance** ⇒ **Main Window Options**. And if you uncheck the showing of the Annual Pledge field on the [Donor tab](#) of **Maintenance** ⇒ **Main Window Options**, this sub-menu does not appear at all.

**Note:** In Canada when [split receipting](#) is used, the donation amounts counted in any of the following reports is the Eligible Amount, not the Total Amount. In all other cases and other countries, the amount is always the donation's Amount or Total Amount field.

The following two reports are always available:

**Current Year Pledges and Totals:** *If the Pledging Type is Simple Annual Pledge:*

Lists all donors with their donation amounts and annual pledge amounts for the current year. Only includes donors who have either a donation amount or a pledge for the current year. See [Pledges in DONATION](#) for more information on pledges.

*If the Pledging Type is Annual with Start Date and*

*Category, or Multi-Year:*

Lists all donors who have pledges, with the pledge start date and category, and the pledge amount, total amount donated in the current year towards the pledge, and outstanding amount (or \$0 if the pledge has been fulfilled or even overpaid).

To run this from an automated [reports script](#), the main argument to RunReport() is:

Name= Pledge Reports -> Current Year Pledges and Totals

See below for an explanation of when a FiscalYear= argument is also required.

**Current Donor Details**

Shows the pledge information for this donor, plus the list of all donations so far that go towards fulfilling the pledge. Exactly what is shown in this report varies with the pledging type as set in the Pledge tab of Maintenance -> Main Window Options.

To run this from an automated [reports script](#), the main argument to RunReport() is:

Name= Pledge Reports -> Current Donor Details

See below for an explanation of when a FiscalYear= argument is also required.

Note: for both of the reports above, if you have checked the "Pledges are on a fiscal year basis" checkbox in the [Pledges tab](#) of **Maintenance** => **Main Window Options**, the reports are modified to be on a fiscal year basis rather than the standard calendar year basis. In that case, another argument is needed for RunReport in a reports script:

FiscalYear= Prior or Current

The following reports are only available if the Pledging Type is Multi-Year:

**Multi-Year Pledges and Totals** Lists all donors who have pledges, with the pledge start date, number of years and category, the pledge total amount (for all years), the total amount donated (in all years) and the outstanding amount (or \$0 if the pledge has been fulfilled or even overpaid).

To run this from an automated [reports script](#), the only argument to RunReport() is:

Name= Pledge Reports -> Multi-Year Pledges and Totals

**One Start Date Pledges**

Lists all donors with pledges with a specified start date, with their number of years, end date, category, pledge total amount, and total amount donated.

To run this from an automated [reports script](#), the

arguments to RunReport() are:

Name= Pledge Reports -> One Start Date Pledges

Date=, which can be a named date or specific date in your computer's date entry format (see [here](#) for more details)

### **Fulfilled Multi-Year Pledges**

Lists all donors with pledges that have been fulfilled (paid entirely), with the pledge start date, number years, latest payment date (which is normally the date on which the pledge was fulfilled, unless there have been excess payments), pledge category, pledge total amount (for all years), and the total amount donated. Sorted in descending order of latest payment date.

This report could be useful for identifying when donors who are paying by pre-authorized payments, who need to have those payments stopped.

To run this from an automated [reports script](#), the only argument to RunReport() is:

Name= Pledge Reports -> Fulfilled Multi-Year Pledges

### **Future-Year Projections**

Lists all donors with pledges that extend at least into the following year, with their pledge start date and category, their pledge amounts for each of the next 5 years, and overall pledge totals for each of those years.

To run this from an automated [reports script](#), the only argument to RunReport() is:

Name= Pledge Reports -> Future-Year Projections

## **8.11 The Reports -> Receipt Sub-Menu**

This page lists all of the options on the **Reports** ⇒ **Receipt** sub-menu. They can also be run by using the [Report Browser](#) and drilling down into the RECEIPT REPORTS.

Like almost all other reports, they can be run from an automated [reports script](#). Instructions for the arguments needed to do so from a reports script are included below the description of each report. The Name= argument for each one is always taken from the choices you drill-down through to find that report in the Report Browser.

### **All Receipts**

Prints basic information on all receipts printed this year. This report varies a bit depending on whether you are showing the Eligible Amount field in the donation details area (in which case this report distinguishes between the Total Amount and Eligible Amount of the receipt), and whether you are using distinct Gift In Kind receipts (in which case this report shows whether or not each report is for a Gift In Kind, under the heading "GIK?"). The "Replacement/Correction Type" field shows the type for corrected or replacement/duplicate receipts, and is blank for original receipts.



To run this from an automated [reports script](#), the only argument to RunReport() is:

```
Name= Receipt Reports -> All Receipts
```

**Incorrect Receipts** Lists receipts where the receipt amount does not match the total amounts of donations comprising the receipt, which must be [corrected](#).

To run this from an automated [reports script](#), the only argument to RunReport() is:

```
Name= Receipt Reports -> Incorrect Receipts
```

**Mailing Labels** Prints mailing labels for all receipts with a given issue date (default the latest issued date of receipts for the current working year). See the section on [Mailing Labels](#) for details on the types of labels available.

To run this from an automated [reports script](#), the arguments to RunReport() are:

```
Name= Receipt Reports -> Mailing Labels
```

```
Date= (see here for more details)
```

```
SkipDonorsWithEmail= Y or N
```

```
Size= 2up or 3up (2up is the 4" x 1" labels, 3up is the 2.625" x 1" labels)
```

**Envelopes** Prints donors' names and addresses on standard #10 envelopes for all receipts with a specified issue date (default the latest issued date of receipts for the current working year). See the section on [Envelopes](#) for further details.

To run this from an automated [reports script](#), the arguments to RunReport() are:

```
Name= Receipt Reports -> Envelopes
```

```
Date= (see here for more details)
```

```
SkipDonorsWithEmail= Y or N
```

```
IncludeOrganizationNameAddress= Y or N
```

```
IncludeLogo= Y or N
```

## 8.12 The Reports -> Category Sub-Menu

This page lists all of the options on the **Reports** ⇒ **Category** sub-menu. They can also be run by using the [Report Browser](#) and drilling down into the CATEGORY REPORTS.

Like almost all other reports, they can be run from an automated [reports script](#). Instructions for the arguments needed to do so from a reports script are included below the description of each report. The Name= argument for each one is always taken from the choices you drill-down through to find that report in the Report Browser.

**Donation** Prints the list of donation categories in alphabetical order.

To run this from an automated [reports script](#), the only argument to RunReport() is:

Name= Category Reports -> Donation

**Accounting Accounts** Prints the list of donation categories with their corresponding accounting accounts, if that has been configured with the **Maintenance** ⇒ **Bank Deposit Exporting Configuration** [menu option](#). (Note: This report is not visible on the menu if that has not been configured, or you have chosen the option "No Processing of Bank Deposits" on that window.)

To run this from an automated [reports script](#), the only argument to RunReport() is:

Name= Category Reports -> Accounting Accounts

**Donor Category 1** Prints the list of Donor Category 1 categories in alphabetic order. The name of this report can change, if you have changed the name of the donor Category 1 field, with an entry on the [Donor Details](#) tab of the **Maintenance** ⇒ **Main Window Options** window. For instance, if you change it to "Membership", the name of this report becomes "Donor Membership (Category 1)".

To run this from an automated [reports script](#), the only argument to RunReport() is:

Name= Category Reports -> then the displayed name of the report, as explained above

**Donor Category 2** Same, for Donor Category 2.

## 8.13 The Reports -> Fiscal Year Sub-Menu

This page lists all of the options on the **Reports** ⇒ **Fiscal Year** sub-menu. They can also be run by using the [Report Browser](#) and drilling down into the FISCAL YEAR REPORTS.

The **Reports** ⇒ **Fiscal Year** sub-menu includes reports on the total donations per donor within a fiscal year, individual donations within a fiscal year, or other summaries of donations within the fiscal year. You can also design your own fiscal year-based reports in the **Reports** ⇒ **Custom Reports** [window](#).

Before creating any fiscal year reports, you need to set up the fiscal year start's month and day in the **Maintenance** ⇒ **Organization Info** [window](#).

If your fiscal year is the same as the calendar year, the reports in this sub-menu are not available, because they merely duplicate the features of other existing reports, on the **Reports** ⇒ **Donor** [sub-menu](#) or the **Reports** ⇒ **Donation** [sub-menu](#). These reports are also not visible if you have set up [Fiscal Year Data Entry and Receipting](#), and are in a working year that is a fiscal year, because in that case the regular reports are for fiscal years anyways.

Please see [Fiscal Years in DONATION](#) to fully understand how the program deals with calendar and fiscal years.

Like almost all other reports, these ones can be run from an automated [reports script](#). Instructions for the arguments needed to do so from a reports script are included below the description of each report. The `Name=` argument for each one is always taken from the choices you drill-down through to find that report in the Report Browser. Named `DateRange=` arguments used with these reports will often use the [named ranges](#) for fiscal years, like `This Fiscal Year`. You may also find that some scripts that work with certain `DateRange=` arguments when today's date is before your fiscal year start (so that today is within the program's view of what the current fiscal year is) will have to be changed to have different `DateRange=` arguments when today's date is after your fiscal year start (so that today is not within the program's view of what the current fiscal year is).

The following are the reports on the **Fiscal Year** sub-menu:

**Donor Totals, Sort by Name** Lists all donors with their total donations for the current fiscal year, and their Donor Category 1 and 2 values. A selection window is first displayed, allowing you to specify a range of dates within the current fiscal year, and optionally only one Donation Category, to include in the report.

To run this from an automated [reports script](#), the arguments to `RunReport()` are:

`Name= Fiscal Year Reports -> Donor Totals, Sort by Name`

`DateRange=`, or `StartDate=` and `EndDate=` (see [here](#) for more details)

`Category=` (All, or a donation category name)

**Donor Totals, Sort by Amount** Lists donors with donations during the current fiscal year, with their donation totals, and their Donor Category 1 and 2 values. Sorted descending by the total donation amount. A selection window is first displayed, allowing you to specify a range of dates within the current fiscal year, and optionally only one Donation Category, to include in the report.

To run this from an automated [reports script](#), the arguments to `RunReport()` are:

`Name= Fiscal Year Reports -> Donor Totals, Sort by Amount`

`DateRange=`, or `StartDate=` and `EndDate=` (see [here](#) for more details)

`Category=` (All, or a donation category name)

**Donor Totals, Sort by Member/Envelope #** Lists donors with donations during the current fiscal year, with their member/envelope numbers and donation totals. Sorted by member/envelope number for donors with such a number, then by name for all other donors. A selection window is first displayed, allowing you to specify a range of dates within the current fiscal year, and optionally only one Donation Category, to include in the report.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Fiscal Year Reports -> Donor Totals,  
Sort by Member/Env #

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

Category= (All, or a donation category name)

**Donation Details, Sort by Name** Gives the details of all donations during the current fiscal year, sorted by donor name. A selection window is first displayed, allowing you to specify a range of dates within the current fiscal year, and optionally only one Donation Category, to include in the report.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Fiscal Year Reports -> Donation  
Details, Sort by Name

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

Category= (All, or a donation category name)

**Donation Details, Sort by Date** Gives the details of all donations during the current fiscal year, sorted by donation date. A selection window is first displayed, allowing you to specify a range of dates within the current fiscal year, and optionally only one Donation Category, to include in the report.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Fiscal Year Reports -> Donation  
Details, Sort by Date

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

Category= (All, or a donation category name)

### **Receipted Donations**

Lists all receipted donations, sorted by date then name. If you are showing the Eligible Amount field for donations, that is also included in this report. You are prompted for a range of dates within the current fiscal year to include in the report.

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Fiscal Year Reports -> Receipted  
Donations

DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

### **Non-Receiptable /**

**Pre-Receipted Donations**

Lists all donations that are not eligible to be included in a receipt, because their Category is "Non-Receiptable" or starts with "NR " or ends with " NR", or their Cheque # / Paid By value is "Non-Receiptable" or "Pre-Receipted", or the donor's Category 1 or Category 2 value is "Non-Receiptable" or starts with "NR " or ends with " NR". If you are showing the Eligible Amount field for donations, that is also included in this report. You are prompted for a range of dates within the current fiscal year to include in the report. Sorted by date then name. See [Non-Receiptable Donors and Donations](#) for more details.

To run this from an automated [reports script](#), the arguments to RunReport() are:

```
Name= Fiscal Year Reports -> Non-Receiptable / Pre-Receipted Donations  
DateRange=, or StartDate= and EndDate= (see here for more details)
```

**Unreceipted Donations**

Lists all donations that have not yet received a receipt but could receive one, sorted by name then date. (It omits any donations that are Non-Receiptable, and thus listed in the previous report) This can be used to identify missed donations that should be receipted if you are using **Receipt ⇒ Filtered Donors** rather than **Receipt ⇒ All Donors** to issue the receipts. If you are showing the Eligible Amount field for donations, that is also included in this report. For Canadian users, also shows which donations are missing Descriptions needed on the receipts (for Gifts in Kind, or donations with Advantage).

To run this from an automated [reports script](#), the sole arguments to RunReport() is:

```
Name= Fiscal Year Reports -> Unreceipted Donations
```

Note: Between them, the previous three reports list all donations in the fiscal year, if you run them for the entire fiscal year.

**Summary by Category**

Gives just a summary of all donations by their donation category, for the entire current fiscal year. This includes a count of the number of donations in each category, and the number of donors giving donations in each category. It also has a total at the bottom, labelled "Total Distinct Donors across all Categories", which is the total number of donors with donations (which is often different from the sum of the "# Donors" column that it appears underneath).

To run this from an automated [reports script](#), the sole arguments to RunReport() is:

Name= Fiscal Year Reports -> Summary by Category

### Summary by Paid By

Like Summary by Category above, but it is summarized by the value in the Cheque # / Paid By field for the donations, not by their Category. If a cheque number is entered into the Cheque # / Paid By field, either "Check" or "Cheque" will be used as the value to summarize on, depending on your location, as set in Maintenance -> Receipt Options.

To run this from an automated [reports script](#), the sole arguments to RunReport() is:

Name= Fiscal Year Reports -> Summary by Paid By

## 8.14 The Reports -> Administrative Sub-Menu

This page lists all of the options on the **Reports ⇒ Administrative** sub-menu. They can also be run by using the [Report Browser](#) and drilling down into the ADMINISTRATIVE REPORTS.

Like almost all other reports, they can be run from an automated [reports script](#). Instructions for the arguments needed to do so from a reports script are included below the description of each report. The Name= argument for each one is always taken from the choices you drill-down through to find that report in the Report Browser.

The **Reports ⇒ Administrative** sub-menu includes any reports that are not really about data in the program, but rather about administrative information.

These reports are not available to [Limited Users](#).

**User Login History** Lists all dates and times that any user logged on or off of the program, in descending date order (latest first), for any selected range of dates (not necessarily in the current year).

To run this from an automated [reports script](#), the arguments to RunReport() are:

Name= Administrative Reports -> User Login History  
DateRange=, or StartDate= and EndDate= (see [here](#) for more details)

## 8.15 The Receipt Menu

**Current Donor Original** Print or view a receipt for all unreceipted but receiptable donations for the currently selected donor.

### Current Donor Original Quick Print

Just like Current Donor Original, but immediately prints the receipt to your default printer and closes the receipt-viewing window, without letting you look at it first. The only messaging is to tell you the receipt number and that it has sent it to your default printer. This is particularly useful for high-pressure situations in which you

have to do a lot of data entry of individual donations and create each receipt immediately after making the entry.

### Current Donor

#### Duplicate/Corrected

Print one duplicate or corrected receipt, for the currently selected donor, for the receipt number of the currently selected donation (which must be listed with a receipt number in the Donations area of the main window).

#### Current Donor Sample

Print a sample receipt for all unreceipted but receiptable donations for the currently selected donor. It will have "SAMPLE ONLY" written in the background on the receipt, and will not save any receipt information back to the database.

#### Duplicate/Corrected by Number

Print a duplicate or corrected receipt. You enter the receipt number in a dialog box, rather than having to be pointing to it as in **Current Donor Duplicate/Corrected**.

#### Reprint Range

[Reprint](#) original (or duplicate or corrected) receipts. You enter the starting and ending receipt numbers in a dialog box, then it redisplayes them on the screen and allows you to print them, optionally marked as Duplicate/Replacement or Corrected.

#### All Donors

Print or view receipts for all unreceipted but receiptable donations for all donors.

#### Filtered Donors

Print or view receipts for selected donations or donors, based on several [criteria](#) that you can enter in a dialog box, for example the minimum donation amount.

#### Delete Range

Deletes a range of receipt numbers, for receipts created in error and not yet sent to the donors. You enter the starting and ending receipt numbers to delete in a dialog box.

#### Unreceipted Donations Report

Provides another way to access **Reports ⇒ Donation ⇒ Unreceipted**, to see which donations are currently receiptable but not yet receipted this year. For Canadian users, this also has a Notes column that contains "Missing Description" for any donations (Gifts in Kind, or donations with Advantage) that need a description to be printed on the receipt, but don't have one.

In the above options, to properly understand which donations are "receiptable", please see [Non-Receiptable Donors and Donations](#).

Also, for Canadian users, the options on this main-level **Receipt** menu (except for Delete Range) ignore all donations whose Cheque # / Paid By value is "Gift in Kind". See [Gifts in Kind](#) for more details. Also, the following menu option then appears on this menu:

**Gift in Kind Receipts** This menu option brings you to the **Gift in Kind Receipts** [sub-menu](#), used for creating receipts for Gift in Kind donations for Canadian



users. It does not appear unless the option mentioned in the previous paragraph is selected.

See [Generating Charitable Receipts](#) for more details on the entries in this menu.

## 8.16 The Receipt -> Gift in Kind Receipts Sub-Menu

This sub-menu only appears for Canadian users. The options on this sub-menu only apply to donations whose Cheque # / Paid By value is "Gift in Kind", and ignore all other donations.

**Current Donor Original** Print or view receipts for all unreceipted Gift in Kind donations for the currently selected donor.

### Current Donor

**Duplicate/Corrected** Print one duplicate or corrected receipt, for the currently selected donor, for the receipt number of the currently selected donation (which must be listed with a receipt number in the Donations area of the main window and must be a Gift in Kind).

**Current Donor Sample** Print a sample receipt for all unreceipted Gift in Kind donations for the currently selected donor. It will have "SAMPLE ONLY" written in the background on the receipt, and will not save any receipt information back to the database.

### Duplicate/Corrected by Number

Print a duplicate or corrected Gift in Kind receipt. You enter the receipt number in a dialog box, rather than having to be pointing to it as in **Current Donor Duplicate/Corrected**.

### Reprint Range

[Reprint](#) original (or duplicate or corrected) Gift in Kind receipts. You enter the starting and ending receipt numbers in a dialog box, then it redisplayes them on the screen and allows you to print them, optionally marked as Duplicate/Replacement or Corrected.

### All Donors

Print or view receipts for all unreceipted Gift in Kind donations for all donors.

### Filtered Donors

Print or view receipts for selected Gift in Kind donations or donors, based on several [criteria](#) that you can enter in a dialog box, for example the minimum donation amount.

See [Generating Charitable Receipts](#) and [Gifts in Kind](#) for more details on the entries in this menu.

## 8.17 The Database Menu

This menu starts with an **Import** sub-menu, then continues with a number of additional options.

### Import ⇒ Donors

[Import just Donors](#) from an Excel, text or CSV file. This is a quite easy and flexible option for importing donors from another donor-management program, or just from a spreadsheet program.

<b>Import ⇒ Donations</b>	<a href="#">Import just Donations</a> from an Excel, text or CSV file, for instance to import recurring monthly donations, or donations exported from another program.
<b>Import ⇒ Donors and Donations</b>	Imports both <a href="#">donors and donations</a> from an Excel, text or CSV file containing both types of information on each line of the file.
<b>Import ⇒ PAR Donations</b>	Import only donations from a text import file provided by the United Church of Canada's <a href="#">PAR</a> (Pre-Authorized Remittance) service.
<b>Import ⇒ All Data</b>	<a href="#">Import data</a> exported from other programs. (This is a rather complex option to import the Donors, Donations, Receipts, Organization Info, and Categories.)
<b>Import ⇒ Abundant Donations</b>	Downloads and imports batches of donations from the <a href="#">Abundant</a> online donation system, which is integrated with DONATION. This menu option is only displayed if Abundant has been configured with the <b>Maintenance ⇒ Setup Abundant Online Donations</b> menu option.
<b>Import ⇒ Vanco Donations</b>	Imports donations downloaded from the <a href="#">Vanco</a> online donation system.
<b>Import ⇒ From Membership Plus</b>	<a href="#">Imports data</a> directly from the database files of the program Membership Plus.
<b>Import ⇒ From GiftWorks</b>	<a href="#">Imports data</a> directly from a GiftWorks database or backup file.
<b>Import ⇒ From PowerChurch Plus</b>	<a href="#">Imports data</a> directly from your PowerChurch plus database files.
<b>Import ⇒ From Roll Call</b>	<a href="#">Imports data</a> dumped from a Roll Call database.
<b>Import ⇒ From Church Assistant</b>	<a href="#">Imports data</a> directly from the database files of The Church Assistant program from Wincrafters, which is no longer available or supported.
<b>Import ⇒ From Viansoft Church Contribution System</b>	<a href="#">Imports data</a> exported from the Church Contribution System from Viansoft, which is no longer available or supported.
<b>Import ⇒ From Geminon</b>	<a href="#">Imports data</a> directly from a Geminon database file.

<b>Validate</b>	<a href="#">Check</a> that your data has not been damaged in any way, for example by suddenly turning off your computer while DONATION is working on something.
<b>Copy Missing Donors</b>	Allows you to <a href="#">copy missing donors</a> and categories from one year to another.
<b>Copy Addresses</b>	Allows you to <a href="#">copy all donor addresses and emails</a> from one year to one or more other years, to get changes you have made in that one year's donor records into the other year's copies of those same donor records.
<b>Reassign Envelope Numbers</b>	Allows you to <a href="#">reassign the envelope numbers</a> to all or some donors, for example at the start of a new year.
<b>Split Donor</b>	<a href="#">Splits a donor record</a> into two identical ones, for example to separate a joint record for spouses into two records, one for each spouse.
<b>Merge Duplicate Donors</b>	Allows you to <a href="#">merge duplicate donors</a> (or non-duplicates that you want to put together, like records for spouses).
<b>Merge Duplicate Donation Categories</b>	Allows you to merge one donation category into another one in the current year, changing any donations using that category to have the other category.
<b>Change Date of Donations</b>	Allows you to <a href="#">change</a> all donations with one specified date to be on another specified date. Generally used if you realize that you accidentally entered a batch of donations with the wrong date, with the <b>File</b> ⇒ <b>One Date Batch Entry</b> <a href="#">menu option</a> .
<b>Delete Old Data</b>	<a href="#">Delete data</a> from past years, that is at least 3 years old (you can choose how old it has to be, before it gets deleted).
<b>Delete All Data</b>	<a href="#">Deletes all data</a> from your database, so that you are starting over with a new completely empty database.
<b>Delete Latest Year</b>	Used only in very unusual circumstances, if you have changed to a new year but didn't intend to, to delete that latest year's data. Can only be used if there are no donations in that year so far!
<b>Switch Databases</b>	<a href="#">Switch</a> to using a database for another organization, or create a new database.
<b>SQL Select</b>	Create simply formatted ad-hoc reports and data extractions using <a href="#">SQL Select</a> statements. (Most users would never use this option, instead using <b>Reports</b> ⇒ <b>Custom Report</b> for ad-hoc reports.)

## 8.18 The Backup/Restore Menu

The following are the menu options on this menu:

**Backup Database**    [Copy](#) a backed-up version of your database, which contains all of your current data, to a USB memory key, writeable CD, or a subdirectory on your hard drive.

**Restore Database**    [Bring back](#) a backed-up database from a USB memory key, CD or subdirectory on your hard drive etc., overwriting (i.e. completely replacing) your current database.

**Email Backup**    [Email](#) a compressed and encrypted backup of your database to any desired email address.

**Restore Emailed Backup** After receiving an emailed backup, and saving the attachment to your hard drive, use this [menu option](#) to restore it, overwriting your current database.

**Restore Internet Backup** Allows you to [restore](#) an Internet backup, stored on the Software4Nonprofits Internet backup storage area. Not available in the [OnDemand](#) version, which does not need or use Internet backups because it is already running on a server.

**Restore Non-Backup Database** Allows you to [restore](#) an actual copy of the database file (for example DONATION4.DB), if you don't have an up-to-date backup file. That's as opposed to the more common option of restoring a backup file (DONATION4.DB.GBK, DONATION-YYYY-MM-DD.DB.GBK, or DONATION-YYYY-MM-DD.HH.MM.SS.DB.GBK, where YYYY-MM-DD represents the date the backup was made and HH.MM.SS represents the time)

**Backup Frequency and Options**    This window allows you to set the frequency at which you are reminded to backup your database, and determine how many older backups are stored in your backup location. The reminder frequency defaults to Weekly, and the reminders occur just as you are exiting the program. This window also allows you to set up for [Internet Backups](#).

## 8.19 The Tools Menu

**Register Online**    Brings up a [Registration window](#) that displays the [Organization Info](#) data, and allows you to fill in a few other fields, to submit your registration information to Software4Nonprofits.com, and thus get onto the mailing list, so you hear about new releases of the program etc.

**Check for Updates**    Brings up a window that allows you to [check for updates](#) to the program that are newer than your current version. It also allows you to specify whether or not the program should remind you to check for updates monthly. (By default, it does remind you.) For

users of the legacy [Lite](#) version, it also allows you to upgrade to the evaluation version of the full featured paid version.

**Request or Install  
License Key**

Brings up the [Evaluation and Licensing](#) window in which you can request or install keys for extending your evaluation period (if your DONATION is an unlicensed evaluation version) or for licensing your installation of DONATION. If you are already licensed, this shows you that fact and whether or not you are eligible for support and updates, based on the last payment date.

If you have an Internet connection on your computer, and have taken one of several actions that communicates your database's Unique ID to us, updating your license key may happen fairly automatically when you choose this menu option, if you have paid since you last updated your license key.

**Pay your Annual Fee**

This takes you to our payment processor Stripe to pay your annual fee by credit card, or from your bank account. For Canadian users, this prompts for the payment method, and if you choose bank account, you are prompted for the name and email address for your account. For US and other users, this is not required - US users automatically get a choice to pay either way, without a separate prompt about it being needed.

**Explore Data Directory**

Brings up a Windows Explorer or Computer type window, to view the files in the program's [Data Directory](#) (which as of version 3.30 is no longer under the main program directory, and is in different places depending on your version of Windows).

**Explore Temp Directory**

Brings up a Windows Explorer or My Computer type window, to view the files in the user's Temp directory (which is in different places depending on your version of Windows and your login username). This can be useful in certain support situations, because there are various files that the program might put there.

**View Saved Settings**

Allows you to [view all settings](#) saved by the program for later use.

**Network Client Information**

This menu option only appears in the [Local Network Server](#) version of DONATION. It displays the server name needed to successfully install the Local Network Client Version of DONATION on other computers in your network, and gives you an option to print that information, or open it in a document in Microsoft Word.

**Fix novaPDF Problems**

Downloads and runs a program from our website to uninstall and reinstall the novaPDF PDF printer, to fix problems that sometimes come up with PDF printing of mail-merge letters or

receipts (for instance if you uninstall the printer driver, or delete some of its files). This menu option is not present in the [OnDemand](#) version, because novaPDF is not needed for creating PDFs of mail-merge letters or receipts in that version.

### Turn Debug Mode On

This menu option lets you temporarily turn what is called "Debug mode" on in the program, if we have asked you to do so. Doing that causes certain debug messages and logging to occur, to help us solve problems you are having.

## 8.20 The Help Menu

### Contents and Index

Initially shows the Index tab for this Help file, which allows you to search for all topics in the Help. You can switch from there to the Contents tab, if you want to browse by general subject areas.

### Search by Topic or Keyword

This just brings up a messagebox giving you instructions for how to do that, but it also has buttons that take you either to the Help file where you can use the Index for searching, or to the How to Use Help help page for further instructions.

### How to Use Help

Show help on using Windows help files, if you are not familiar with them.

### Help on ...

Changes its text (and effect) to show the help appropriate to the current section of the main window, or the previous top-bar menu that you pulled down.

### Training Videos on the Web

Goes to the Demos and Samples page on the program's web site. That page has both introductory and in-depth training videos on it that you can watch.

### Quick Start

Go straight to the [Startup Options](#) page in this help file.

### Technical Support Information

Go straight to the page on [Technical Support](#) in this help file, that explains the various options you have for support.

### Move DONATION to Another Computer

Go straight to the help page [Move the Program from One Computer to Another](#), to learn how to do that.

### Revision History

Go straight to the page on [Revision History – Latest Version](#) in this help file, to read about the most recent changes to the release of the program that you currently have installed.

To see the revision history for the most up to date release of the program, which may be newer than what you have installed, go to the **Tools = Check for Updates** [window](#) and use the **View Updated**

**Features** button, which takes you to the current web version of this same Help page.

### **Software4Nonprofits**

#### **Web Site**

Use an Internet browser to connect to the main [Software4Nonprofits.com](http://Software4Nonprofits.com) web page on the DONATION program (requires that you be connected to the Internet).

#### **Email**

**Software4Nonprofits.com** Use your Windows default email program, or a plain-text email form with the program. to send an email to us at [Software4Nonprofits.com](mailto:info@Software4Nonprofits.com). (The first option requires you to be using a standard email program like Outlook, Outlook Express, the Windows 10 Mail application, or Thunderbird. If you use only web-based email like Hotmail, Yahoo Mail or Gmail, just send an email to [info@Software4Nonprofits.com](mailto:info@Software4Nonprofits.com) yourself, or use the 2nd option, the plain-text form in the program.)

**View License Agreement** Displays the Software License Agreement for DONATION in a web browser window, which also allows you to print it.

**About DONATION ...** Gives some information about the author of this program, and tells you which version of it you are using.



## 9 ENTERING AND MAINTAINING DONORS

### 9.1 Entering and Maintaining Donors

[Entering a New Donor](#)  
[Titles in Donor Names](#)  
[Finding a Donor](#)  
[Editing a Donor](#)  
[Customer IDs for Donors](#)  
[Deleting a Donor](#)  
[Sending Emails to a Donor](#)

### 9.2 Entering a New Donor

To enter a new donor, press **F3**, click the **New** button above the Donor Details area on the main screen, or select **File** ⇒ **New Donor**. Then fill in all of their details. Remember to press **Tab**, not **Enter**, to move from field to field.

You will notice that as soon as you start editing the new donor, if necessary the Donor Details area expands downwards so that you do not have to scroll it to enter all of the fields. If this happens, the Donations area also disappears (though only if the Donor Details area would otherwise be overlapping it). This will change back when you finish editing the donor's information.

Here is an image of the Donor details area of the main window with most of the optional fields (as mentioned in the next section below) showing:

**Donor Details**              

Member/Env. #: 123

Business Name:

Title / First Name:  CAROL

Mid.Init. / Last Name: E.  ADAMS

Address Line 1: 100 Rue Main

Address Line 2: Montreal, QC

Address Line 3:

Postal Code: H3H 1Z9

Phone: (514) 555-1111

Email Address: [cadams@anyisp.com](mailto:cadams@anyisp.com)

Category 1: Member

Category 2:

Annual Pledge:

Charitable #:

Groups / Committees:

Other Info 1:

Other Info 2:

Other Info 3:

Comments:

### Optional Fields

Which fields are displayed in the Donor Details area as shown above can be controlled by a number of checkboxes in Donor Details tab of the **Maintenance = Main Window Options window**. The fields that can be optionally omitted from the Donor Details are the Member/Env. #, Title, Middle Initial, Email Address, Category 1, Category 2, Annual Pledge, Charitable Number, Groups / Committees, Other Info 1 through 6, and Comments. (In the image above, Other Info 4 through 6 are not showing.)

### Member or Envelope Numbers

If your organization uses Member or Envelope numbers, you can fill this into the first field, Member/Env. #. If you are assigning such numbers for the first time, or are willing to reassign the numbers, you can have the program fill them in for you automatically. To do that, either click the drop-down arrow at the right of this field, or right-click in this field. Either action causes a small two-item popup menu to come up, as long as the field is currently blank. The options are:

- **Next Higher Member/Env. #**, which automatically fills in the field with the number one higher than the highest Member/Envelope # used so far for any other donor, or
- **Last Unused Member/Env. #**, which automatically fills in the field with the number that is the first gap in the sequential numbering (or 1 if that hasn't yet been assigned to any donor).

Both of those options obey the setting for "Lowest Member/Env. # for automatic assignment" on the Donor tab of the **Maintenance ⇒ Main Window Options** [window](#). So the first one will always enter a number that is at least that lowest number, and the 2nd one will always fill in the first gap in the number that is at least that lowest number.

You can also use the **File ⇒ Next Higher Member/Env. #** or **File ⇒ Lowest Unused Member/Env. #** main menu options, to do the same things, or the **Database ⇒ Reassign Envelope Numbers** [menu option](#) to assign or reassign all or certain donors' envelope numbers.

### Name Fields

There are up to five name fields, depending on choices in the **Maintenance ⇒ Main Window Options** [window](#): Business Name, Title, First Name, Middle Initial (abbreviated as "Mid.Init" to make it fit) and First Name.

When the Business Name is filled in, it is assumed to be the name of a business or organization that is making the donations. In that case, you can also fill in the other Name fields, but they are assumed to just be the contact name within the organization - the main name that is displayed on receipts, reports, the Donor List etc. will be the Business Name.

For individual donors, leave the Business Name field blank, and fill in the other name fields for the person making the donation.

In versions of DONATION prior to version 3.03 (released in late 2007), there was no Business Name field, and users often put the business name into the Last Name field. When version 3.03 or later is first started, this is fixed, by moving names with only a Last Name filled in to the Business Name field. However, for long business names that would not fit into the Last Name field, users sometimes split them between the First Name and the Last Name field. Those ones would have to be moved to the Business Name field by editing the donor record directly.

In releases of DONATION prior to 4.18 (released in August 2019) there were no Title or Middle Initial fields, so users who wanted to record them would usually put both into the First Name field (such as First Name "Mr. John Q."). If you want to continue doing that, you can turn off the display of the Title and Middle Initial fields in the "Show Fields" area of the **Maintenance ⇒ Main Window Options** [window](#).

If you had been entering the title or middle initials as part of donors' First Names, and you are satisfied with the way they therefore appeared anywhere in the program where the First

Name was displayed, there is no need to change to using the separate Title and Middle Initial fields.

For couples donating together, you may want to list them in only one donor record, so they only get one receipt. To do that, select one name to file it under. You can then enter both first names under the First Name field (if they have the same last name), for example:

First Name: Bob and Mary  
Last Name: Smith

If they have different last names, you can do something like the following:

First Name: Bob  
Last Name: Smith & Mary Jones

Since names are always printed as First Name then Last Name, this will print as "Bob Smith & Mary Jones" which is what you want. However, note that it will always be alphabetized under "Smith", so you can't find it sorted under "Jones", for instance on the Donor List on the main window. However, you can find it by specifying "Jones", without the quotes, in the window reached with the **File** ⇒ **Find Donor** menu option.

See also [Salutations for Donors](#) for more details about how such names are used after "Dear" in [mail-merge letters](#).

### Address Fields

Canadian users must have at least the first line of the address filled in, because the Canada Revenue Agency requires full donor addresses to be printed on the receipts. All other users can leave the address fields blank if they do not need an address to be required for their donors.

You may include a postal or zip code either in the Postal Code field, or as all or part of one of the three Address fields. Do not include it in both, as it will then be printed twice when printing addresses. An advantage of using the Postal Code field is that you can sort or filter on those values. Also, entries in the Postal Code field are automatically forced to be capitalized if they include letters (as in Canada).

When addresses are being printed, as on the official [tax receipts](#) generated by the Receipt menu options in the program, or when printing [mailing labels](#) or [envelopes](#), the contents of the Postal Code field are always automatically added at the end of whichever is the last filled in of the Address Line 2 and Address Line 3 fields.

If you leave address lines empty, with a filled-in line following them, they will be moved up when you Save the changes, so there are no blank lines left within the address. So a filled-in Address Line 2 will move up into the space of an empty Address Line 1, and a filled-in Address Line 3 will move up into the space of an empty Address Line 2.

If most of the donors to your organization live in the same area, you may want to specify default values for any or all of Address Line 2, Address Line 3 and Postal Code. This can be done with the options on the Donor Details tab of the **Maintenance** ⇒ **Main Window Options** [window](#). If you do this, whichever of those fields you set up defaults for will be automatically pre-filled when you start to create a new donor. Of course, if you use these

defaults, be very careful to change the values for individual donors whose address doesn't happen to correspond to the default values.

Canadian and US Postal Code field entries that are not formatted properly will in many cases be corrected for you as you tab or click out of the field, or when you **Save**.

#### Phone Number

The phone number is only for reference, and is not required or printed on the receipts.

To save you a bit of typing, phone numbers entered as all digits with no separators are automatically reformatted when you tab or click out of the field, or **Save**, so that 1234567 is changed to 123-4567, and 1234567890 is changed to (123) 456-7890. Various other formats are also fixed appropriately, such as changing 123 456 7890 or 123-456-7890 to (123) 456-7890.

If you prefer the format 123-456-7890 for 10-digit numbers, you can switch to that, with the [Phone Format](#) option on the Donor Details tab of **Maintenance -> Main Window Options**.

#### Email Address

You may enter an Email Address for the donor. For any donor for whom you have entered an Email Address, if you right-click on that field, a small one-item popup menu comes up, with the option **Send Email**. If you select that menu option, an email will come up in a [window](#), addressed to the email address in this field. (This requires you to have configured [email sending](#) with **Maintenance ⇒ Email Sending Configuration**.)

This email address is also used for [emailing receipts and letters](#).

The Email field can include multiple email addresses separated by semicolons, such as "john@gmail.com;mary@gmail.com", without the quotes. If you do that, when emails need to be sent to the donor, a single email will get sent, with both addresses on the "To" line. One thing to beware of if you are doing this, if you are planning to export emails to [mass mailing services](#), is that they will almost certainly only allow one email address in the field you export to them, so you will not want to use this capability.

#### Charitable Number

If the donor is itself another charitable organization, you can enter their Charitable Number in this field, for tracking.

#### Donor Categories

You can set up two distinct lists of category values, for categorizing your donors, via the **Maintenance ⇒ Donor Category 1** or **Maintenance ⇒ Donor Category 2** [menu options](#). However, this is completely optional - many users do not use the Donor Category fields at all, and as mentioned above, these fields can even be hidden via options on the Donor Details tab of the **Maintenance ⇒ Main Window Options** [window](#).

If you wish to select categories for a donor, the easiest way is to Tab or click into the Category 1 or Category 2 field and use the "autocomplete" feature. If you type in a letter or letters that are the initial part of the category value you want to select, the rest will appear,

highlighted so it will be overwritten if you keep typing. For instance, if your categories that start with "M" are "Member" and "Minister", typing "M" or "m" will bring up the first match starting with that letter, which is Member, and adding "i" will change it to show Minister. Alternatively, click on the small down arrow button at the right of the field and select the category from the scrolling list that appears. If you need to undo a category selection, the first entry in the scrolling list is always a blank one, which means no category.

There is also always an "<Add New>" option on each of the drop-down lists of donor Categories. Selecting it brings up the appropriate maintenance window, pre-set to add a new category.

See [Non-Receiptable Donors and Donations](#) for ways to mark Donor Categories as Non-Receiptable, so that donors marked with those categories will never receive a charitable receipt created with the Receipt menu options. This could be helpful if you have a donor such as "Cash", in which you enter anonymous cash donations, or for donors that are themselves charities to which you should not issue official charitable receipts. (This latter point is true at least in Canada. I'm less sure about it for other countries.)

You can change the labels of these fields to anything you want by using the [Donor Details tab](#) of **Maintenance** ⇒ **Main Window Options** and changing the values in Category 1 Label or Category 2 Label. For instance if Category 1 was being used to select a membership status for the donor, you might change it to be named "Membership Status" or just "Membership".

#### Groups / Committees

This field allows you to specify which groups or committees within your organization this donor is a member of. Please see [Groups and Committees](#) for a full explanation both of the initial setup required, to set up your list of groups or committees, and how data is entered into this donor field..

#### Annual Pledge

The Annual Pledge field is an optional field where you can enter the total amount the donor has pledged to give your organization in the current year for which you are entering data. If your donor makes weekly pledges, just multiply that by 52 to get the annual amount.

If you accept annual pledges with a fixed donation category, or multi-year pledges, you can switch to one of two other pledging options that support this, and the name of this field will change. See [Pledges in DONATION](#) for more details.

#### Other Info Fields

After the Annual Pledge, there are six fields which you can use for your own purposes. By default they are called Other Info 1 through Other Info 6. But you can change the labels of those fields to anything you want by using the [Donor Details tab](#) of **Maintenance** ⇒ **Main Window Options** and changing the values in Other 1 Label through Other 6 Label. For instance, you might change some of them to be called "Title", "Fax", and "Birthdate", if those were some other pieces of information you wanted to track. **Note:** The Other Info 4 through 6 fields are not initially shown when you install or upgrade DONATION, unless you check the checkboxes for showing them on that same Main Window Options window.

#### Comments

To edit the comments, you have a few choices. One option is to type directly in the smallish box for the Comments in the Donor Details area. Alternatively, pick the menu option **File ⇒ Edit Comments**, or with the cursor positioned in the Comments field, right-click in this field and select **Edit Comments** from the small one-item popup menu that comes up. A mid-sized window will come up on which you can edit the comments. Comments can be virtually any length, and contain anything about the donor that you wish to include. To go onto a new line when editing them, just press **Enter**. The comments will automatically word-wrap as you type.

Note: If you have made the Comments field invisible by unchecking its checkbox in the Donor Details tab of **Maintenance ⇒ Main Window Options**, you can still edit it with **File ⇒ Edit Comments**. It just won't show up in the main Donor Details area.

#### Saving Changes or Cancelling

When you are done, save the information by pressing **Enter** or **F10**, or clicking the **Save** button, or selecting **File ⇒ Save Changes**. If you decide you did not want to enter a new donor after all, press **ESC**, or click the **Cancel** button, or select **File ⇒ Cancel Changes**. (Note that you can't do anything else in the program until you choose one of those two options to finish or cancel entering the new donor.) Also note that you can't use **Enter** to do the save while you are in the Comments field, because it is reserved for inserting a new line into the comments.

#### Maintaining IDs for Donors

The **IDs** button is enabled when you are not editing a donor, to maintain any Customer IDs for this donor from third-party online donation services, such as Vanco. This button is only visible if you have checked "Customer IDs" in the Show Fields area of the [Donor Details](#) tab of **Maintenance ⇒ Main Window Options**. See [Customer IDs for Donors](#) for full details.

#### Donors in Different Years are Separate

Once you have multiple years of data in the program, each year's donor records are separate. Please see [Changing Years in the Database](#) to understand this more fully.

If you have added one or more new donors to one year, that you want to be present in another year, you can do that with the **Database ⇒ Copy Missing Donors** [menu option](#).

## 9.3 Titles in Donor Names

Releases of DONATION prior to 4.18 (released in August 2019) did not have a separate field for the title that some people use as part of their name, as in "Mr. John Smith".

The reason for that was largely historic - the original author of the program, Dan Cooperstock, is a Quaker, and wrote the program originally only for his Quaker Meeting. Quakers have a historic testimony (religious-based practice) of not using titles with names, because often they indicated rank or status, and the more general Quaker testimony of equality (the view that we are all of equal worth in the eyes of God) conflicts with that.

Starting in release 4.18 there is a separate Title field for names, though it can be hidden with a checkbox in the "Show Fields" section of the **Maintenance ⇒ Main Window Options** [window](#).



And also starting in that release, there is a checkbox "Include Title in Names in Letters and Receipts" in that same window. If it is checked, Titles will automatically be included in all [receipts](#), all [mail-merge letters](#), when [Emailing Newsletters or Everyone](#), and also in the two [statement](#)-like reports, **Reports** ⇒ **Donation** ⇒ **Details, One Page per Donor** and **Category Totals, One Page per Donor**.

Additional fields including Titles were also added to [Custom Reports](#) as part of the same release.

## 9.4 Salutations for Donors

Some users may want to enter custom salutations for donors, for use after "Dear" in mail-merge [letters](#) or receipts. (For [mail-merge receipts](#), that would likely only be used in a letter [added](#) to the official receipt.)

The initial letter templates delivered with DONATION use "Dear «Name»". The «Name» field is the donor's Business Name if there is one, or otherwise their first name and last name together (omitting any Middle Initial or Title), such as "John Smith".

You can of course change that in the mail-merge [editor](#) to some other name field or combination of fields, but there may not always be a perfect choice, depending on your data.

One issue that has been brought to our attention is the case when a couple with different last names are entered in a single donor record (a common choice, since in both Canada and the U.S.A. couples can claim donations on their taxes that either of them has donated). For John Smith and Peter Brown, one way of entering that (to ensure that the First Name field followed by the Last Name field reads properly, would be:

First Name: John  
Last Name: Smith and Peter Brown

However, if you had chosen to change your letters to start "Dear «FirstName»" instead of "Dear «Name»", that would end up saying only "Dear John", rather than "Dear John and Peter", which would be more appropriate. So here is one solution to that problem, if you do want first names rather than the full name to appear in those letter salutations:

1. First, in the Donor Details tab of the **Maintenance** ⇒ **Main Window Options** [window](#), give the name "Salutation", or whatever you want to call it, to one of the 6 renameable Other Info fields, and make sure that Other Info field is marked as being visible with a checkbox in the Show Fields part of that window. (We will assume you use the Other Info 1 field for that, but you can adjust the following instructions appropriately if not.)
2. For any donor where the value in the First Name field is not what you want displayed as the salutation in your mail-merge letters, fill in that Salutation field appropriately, for instance with "John and Peter" in the example above. You can leave that field blank for any donor where you are satisfied with what is in the First Name field.
3. Edit the template for any letters you want to send, and replace "Dear «Name»" with the following:  
Dear «if:OtherInfo1»«OtherInfo1»«else»«FirstName»«endif»
4. What that means is that if the OtherInfo1 field (the one you named "Salutation") is filled in, it will be used, and if it isn't filled in, the FirstName field will be used. That will give you what you want.

## 9.5 Finding a Donor

### On the Main Window

The most obvious way to find donors is to scroll through the Donor List on the left-hand side of the main window. As with all scroll boxes, you can click on the scroll arrow at the top or bottom of the scroll box to scroll slowly, or click on the scroll bar itself and drag it up or down to scroll very quickly, or click in the empty area above or below the scroll bar (or use the **PgUp** and **PgDn** keys) to scroll by one screenful at a time.

However, there are two better ways to find donors, which are built into this program.

### Finding by Typing in the Donor List

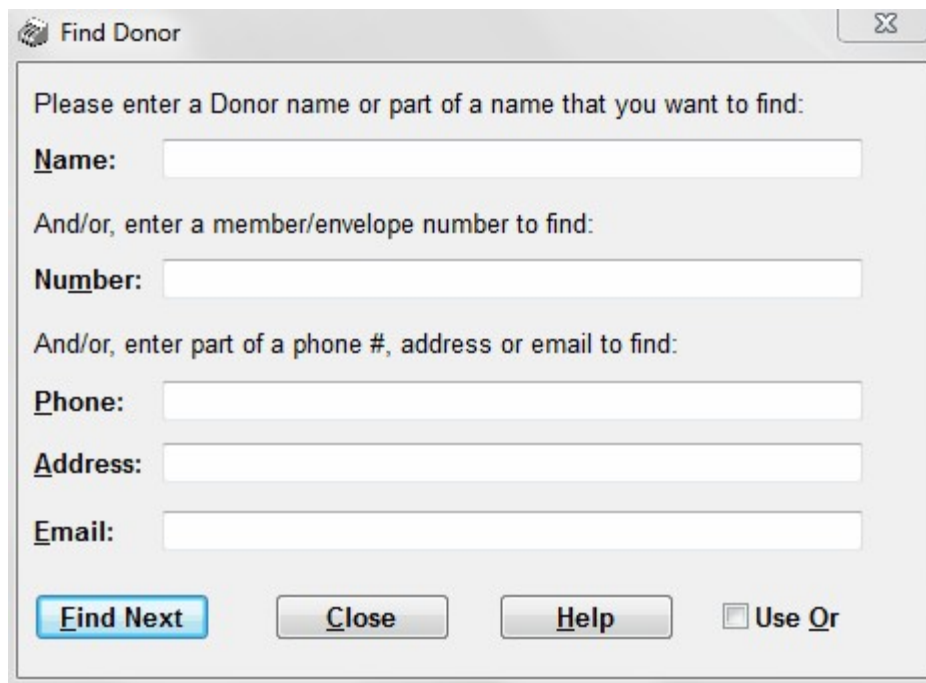
Once the program's focus is on a donor in the Donor List, you can start typing letters of the last name, and it will immediately scroll to the closest match that starts with those letters. (You can also do that with business names, as long as they don't start with a number.) You can backspace to correct mistakes (one character at time) or press ESC to eliminate what you have typed so far and then start over. The letters you have typed show up in the "Find Name / #" area at the bottom left corner of the screen. Usually after you have entered 3 or so letters, you will find that the donor you want is already in view, and you can just click on it. You can also scroll with the up and down arrow keys, and with **PgUp** and **PgDn**.

If you start typing numbers instead of letters, it will search for a donor whose member or envelope number is the same as the numbers you have entered. You can use the number keys at the top of the keyboard, or the ones on the numeric keypad, as long as NumLock is on. This also shows up in the "Find Name / #" area at the bottom of the screen. You have to type the whole number to find the member you are looking for. *(Note: Versions of DONATION prior to version 3.00, released in late 2007, had a weakness, where typing an initial part of a number could go to any donor whose number started with what you had typed so far, so for instance just typing 1 could have gone to the donor with number 10. That is no longer a problem.)*

Unfortunately for technical reasons this method can only handle a limited set of characters in names - regular English letters (no accented letters), the nine digits, space, comma, and dash. (It could technically handle other punctuation characters, but they are not commonly found in names!) If you need to search for any names using any other characters, including accented letters, use the following method instead.

### Using the Find Donor Window

If you wish to find a first name, or part of a name if you are not sure of the spelling, or search on a part of a name containing accented characters, or find by phone number, address, or email address, use the **File** ⇒ **Find Donor** menu option, or **Ctrl+F** (i.e. hold down Ctrl and press F). The following Find Donor window will come up:

A screenshot of a 'Find Donor' dialog box. The dialog has a title bar with a magnifying glass icon and the text 'Find Donor'. Inside, there is a prompt: 'Please enter a Donor name or part of a name that you want to find:'. Below this are four text input fields, each preceded by a label: 'Name:', 'Number:', 'Phone:', and 'Address:'. Below the 'Address:' field is an 'Email:' label followed by another text input field. At the bottom of the dialog, there are four buttons: 'Find Next' (highlighted in blue), 'Close', 'Help', and a checkbox labeled 'Use Or'.

The fields you can find on are:

**Name:** Any part of a name (in the format "Last, First") or of the Business Name for donors that have a Business Name.

**Number:** The exact member or envelope number.

**Phone:** Any part of the phone number.

**Address:** Any part of any of the three donor address fields, or the donor postal code field.

**Email:** Any part of the email address.

For all four text fields (Name, Phone, Address and Email) uppercase and lowercase don't matter. In addition, you can use the special character "%" to represent any missing string of characters. For instance, "Cooper%Dan" will find "Cooperstock, Daniel" in the Name, or "123%5678" will find "(123) 111-5678" or "111-123-5678" in the Phone number.

If you fill in more than one of the fields, normally all of the fields will have to match for a donor to be found. However, if you check the **Use Or** checkbox, donors matching any one or more of the fields you filled in will be found. (I.e. the conditions are joined by "or" instead of by "and".)

After entering whichever field(s) you want to find on, click the **Find Next** button or press **Enter**. The Donor List on the main window will immediately scroll to the next match for that name in the Donor List, or beep if there is no match. You can keep finding further matches by clicking **Find Next** or pressing **Enter** repeatedly. When you are done finding with this window, just click its **Close** button or press **ESC**.

As you will notice, the currently selected donor on the Donor List is always highlighted, and has a little pointing hand icon to the left of it. The current donor also shows up in the Donor Details area, and any donations for it show up in the Donations area.

#### Finding for Limited Users

If you are using the [Limited User Password](#), and have the setting set that limited users can't see donor names at all, then limited users see a version of the Find Donor window that only allows them to find by member/envelope number.

#### Finding on the One Date Batch Entry Window

The same find window that comes up when you use **File** ⇒ **Find Donor** or **Ctrl+F** on the main window is also available on the One Date Batch Entry [window](#) for donations, by clicking its **Find Donor** button or using either **Alt+F** or **Ctrl+F**. It works in exactly the same way.

One thing that is slightly odd about this is that you are still able to find by Phone number, Address or Email on the One Date Batch Entry window, although you cannot immediately see the values in those fields. However, that window has a popup tooltip, when you hover your mouse over the Name field for a donor, that displays whichever of the phone number, address, and email that have been filled in. So that way you can check it's the right one.

## 9.6 Editing a Donor

Once you have [found a donor](#), you can edit their information (to fix spelling, change address etc.). Just click into any of the fields in the Donor Details area and start making changes.

You will notice that as soon as you start making changes to the donor, the Donor Details area expands downwards if necessary, so that you do not have to scroll it to enter all of the fields. The Donations area also disappears (though only if the Donor Details area would otherwise be overlapping it). This will change back when you finish editing the donor's information.

Just as when you are entering a new donor, press **Enter** or **F10** to save the changes, or **ESC** if you wish to cancel your changes. (You can't do anything else in the program until you choose one of those two options to finish editing.)

See also [Entering a New Donor](#) for details on the various fields that you can edit, and for tricks and tips on editing them.

#### Donors in Different Years are Separate

Once you have multiple years of data in the program, each year's donor records are separate. Please see [Changing Years in the Database](#) to understand this more fully.

As a results of this, changes made in a given donor's record for one year, such as corrections to their name, will not be automatically made in any other year. If you want those changes to be present in multiple years, you can switch to the other year and re-do the changes.

However, if the change was only to one or more donors' postal addresses or email addresses, and you want those changes to also be present in another year, that can be done with the **Database** ⇒ **Copy Addresses** [menu option](#). Changes to any other fields must be made more manually.

## 9.7 Customer IDs for Donors

Some users of DONATION may also use 3rd-party online donation services, such as Vanco, that identify their donors by Customer IDs, and need to store those IDs in DONATION for matching, when importing donations.

Customer IDs (called the Abundant Customer ID and Abundant Account ID) are also used and recorded in the program if you use the [Abundant](#) online donation system, which is integrated with DONATION.

If you need to do this, you first need to check "Customer IDs" in the Show Fields area of the [Donor Details](#) tab of **Maintenance** ⇒ **Main Window Options**. Once you have done that, among other changes an **IDs** button appears with the other buttons for the Donor Details area of the main window, to the right of **Save** and **Cancel**. It is only enabled when you are not editing a donor's details.

Clicking that **IDs** button will bring up the following window for maintaining the Customer IDs for the currently-displayed donor (showing an example with one Customer ID saved already):

Vendor	ID
Vanco	1234567890

Buttons: New, Delete, Save, Cancel, Help, Close

This window works like many others in the program.

**Clicking New** will display a new line on which you can enter an ID. To edit an existing line, just click into it and edit as desired. You save changes in a new or edited line with the **Save** button, or you can cancel those changes with the **Cancel** button. The **Help** button brings up this Help topic. Close the window with the **Close** button.

The **Vendor** drop-down list in the editing area includes all vendors that the program currently has any special features for working with. Currently that is Abundant (with both a Customer ID and Account ID) and Vanco.

See [Importing Vanco Donations](#) and [Abundant](#) online donations for details.

This window only maintains the Customer IDs for the currently displayed donor on the main window. If you know a Customer ID but not which donor it has been assigned to (if any), you can use **Reports** ⇒ **Donor** ⇒ **Customer IDs** to view all currently stored IDs, in order. That will allow you to find the donor associated with a given ID.

## 9.8 Deleting a Donor

To delete a donor, first find them on the list. Then click the **Delete** button to the right of the Donor Details area. A question will come up confirming that you want to delete them from the list. This would usually only be done in case you discovered a duplicate entry for the same person, or if you were clearing out old donor names that had not given any money for a long time.

Deleting a donor that appears in multiple years of data in the program only deletes it in the current year. Other years will be unaffected.

Please note that there is an automatic technique for clearing out old donors who have not given recently when you use **Maintenance** ⇒ **Change Year** to start a new year's donations. See below under [Year End Procedures](#).

You are not allowed to delete a donor that has donations recorded for them in the current year. If recording those donations for this donor was truly an error, you will have to delete the donations first then delete the donor. However, if the donation(s) you need to delete have a receipt number, meaning that they have been included in a receipt, you will not be able to delete the donor, because you also can't delete donors who have receipts in the current year, even if all of the donations included in that receipt are deleted. (If the receipts were created in error and never sent to the donor(s), you may be able to first [delete the receipts](#), then delete the donation(s), then the donor.)

If you chose an option on the [Donations](#) tab of **Maintenance** ⇒ **Main Window Options** to display further years of donations on the main window, and the selected donor has displayed donations in other years (but none in the current year) you can delete it. You will receive a message explaining that this does not affect the donor in other years.

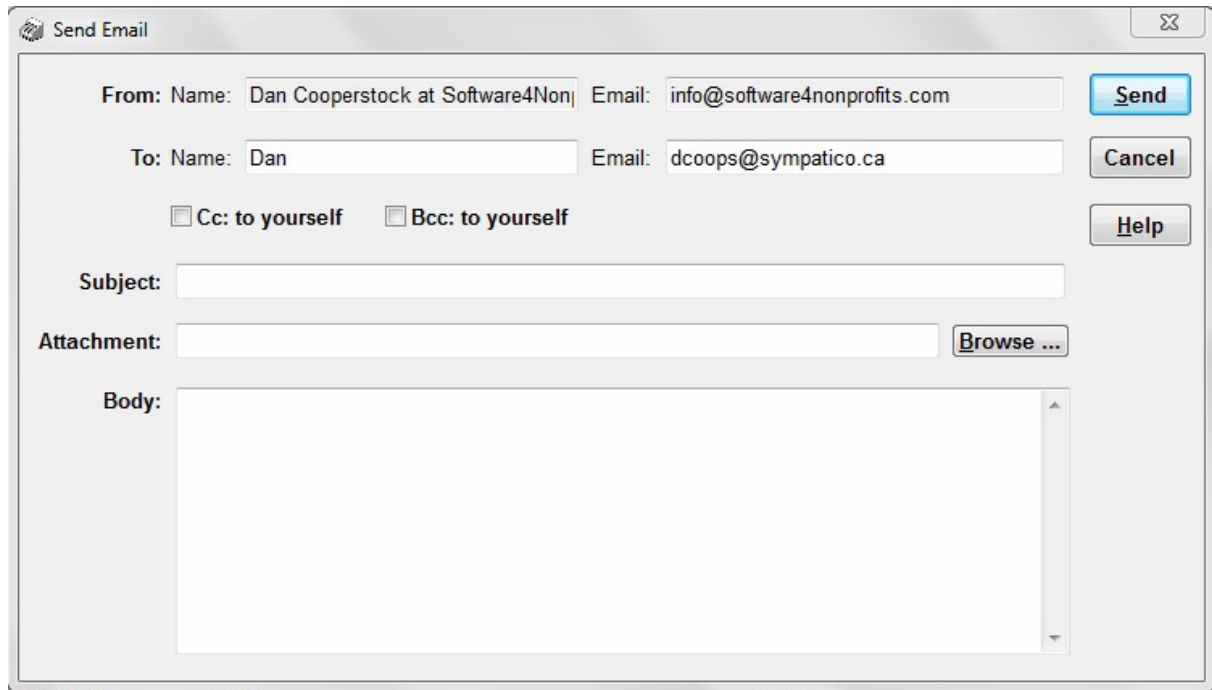
## 9.9 Sending Emails to a Donor

You can send an email to a donor, with whatever contents you wish, either by right-clicking on a filled-in Email Address field in the Donor Details area and picking **Send Email** from the popup menu, or by using the **File** ⇒ **Send Email** menu option.

This same window is used for [emailing backups](#), and emailing reports saved using the **Save As** [button](#).

These options require you to have first configured the [settings](#) for sending emails, set up with **Maintenance ⇒ Email sending Configuration**.

When you use either of those options, a window such as the following comes up:



The screenshot shows a 'Send Email' dialog box with the following fields and controls:

- From:** Name: Dan Cooperstock at Software4Non; Email: info@software4nonprofits.com
- To:** Name: Dan; Email: dcoops@sympatico.ca
- ☐ Cc: to yourself
- ☐ Bcc: to yourself
- Subject:** (empty text field)
- Attachment:** (empty text field) with a **Browse ...** button
- Body:** (large empty text area)
- Buttons: **Send**, **Cancel**, **Help**

The From Name and Email will be filled in with your name and email address that you configured in **Maintenance ⇒ Email sending Configuration**. The To Name and Email will be filled in with the donor's full name and Email Address from the Donor Details area. You can optionally check the "Cc: to yourself" or "Bcc: to yourself" checkboxes, to send a copy or blind copy respectively to your From Email address, in addition to the copy that goes to the donor's To Email address.

The To Email can include multiple email addresses separated by semicolons, such as "john@gmail.com;mary@gmail.com", without the quotes. If you do that, a single email will get sent, with both addresses on the "To" line.

You can then fill in the Subject line and Body, and optionally specify an Attachment. (Use the **Browse...** button to select a file to attach.) The Body is just plain text, so it does not support things like fonts or images.

When you are satisfied with the email you have drafted, click the **Send** button to send it to the donor.

**Note:** Prior to version 3.20 of DONATION, this was not done with an internal email-sending window, but rather it used your default email program, such as Outlook, Outlook Express, or Mozilla Thunderbird, to draft and send the email. However, many users are now using only web mail (like Hotmail, Gmail, Yahoo Mail etc.) and do not have an email program configured, so that would not work for them. This new method should work for anyone who is able to send emails from their computer in any way.



## 10 ENTERING PLEDGES

### 10.1 Pledges in DONATION

DONATION has a range of options for recording your donor's pledges.

To ensure that a pledge field is visible for donors, make sure the "Annual Pledge" checkbox is checked on the Donor Details tab of the **Maintenance** ⇒ **Main Window Options** [window](#). If you don't want to use pledges at all, uncheck that checkbox, and you can ignore the rest of this Help topic!

The options on the [Pledges tab](#) of the **Maintenance** ⇒ **Main Window Options** window allow you to switch between options for a Simple Annual Pledge, which applies to all categories of donation, or Annual with Start Date and Category, or Multi-Year pledges. You can also select a default category for pledges, if you are using one of the two options other than Simple Annual Pledge. And finally, for the first two pledging types (but not Multi-Year), you can select an option for "Pledges are on a fiscal year basis". Please read the Help on the [Pledges tab](#) to fully understand these options.

Note: Prior to version 3.35 of DONATION, the Pledges tab was not present, and DONATION largely functioned the way the Simple Annual Pledge option on that tab now functions.

The program has no capacity to handle pledges for any fraction of a year (for example weekly or monthly pledges). With the Multi-Year option, you can specify the frequency that the donor intends to pay, but you still specify the pledge amounts on an annual basis. There is also no capacity to have distinct pledges for different categories of donations for the same donor, such as one amount for the General fund, and another amount for the Building fund. If you absolutely need that, you will either have to somehow track the additional pledges outside of DONATION, or choose a different program with more detailed pledging features.

To put this another way, only one pledge can be defined for each donor in each year.

#### Data Entry of Pledges

In the Donor Details area of the program's main window, if you are using the Simple Annual Pledge option, there is an Annual Pledge field. You just directly enter the amount that each donor has pledged to donate in the current year, in that field.

With the other two pledging options, the Annual Pledge field is renamed to Current Pledge. It is changed to not be editable, and instead has a drop-down arrow added to it. You click on the drop-down arrow, or right-click in the field, and a popup menu appears with the option "Edit Pledge Details". Selecting that option takes you to a separate window - either the [Single-Year Pledge Details](#) window, or the [Multi-Year Pledge Details](#) window, depending on which option you have selected on the Pledges tab of **Maintenance** ⇒ **Main Window Options**. You do all of your editing of the pledge information in that window.

If you are using either Annual with Start Date and Category or Multi-Year pledges, once you have set up a pledge for the donor, the Current Pledge field displays the current year's pledge amount for that donor.

### Entry of Donations Towards Pledges

With a simple annual pledge that is not for a specified donation category, any donation during that year counts towards fulfilling the pledge.

With pledges that **are** for a specified donation category, any donation for that category during that year counts towards fulfilling the pledge.

You do not have to do anything, when recording those donations, to indicate that they are towards the pledge. The program just automatically matches them against the pledge in relevant reporting.

### Clearing Pledges

If you have entered an Annual Pledge for a donor and no longer want it, just delete that field's contents.

If you are using either of the more complex pledge types, in the editing window for that type of pledge, delete the Pledge Amount or Pledge Total field's contents, and click **OK**. You will be prompted to confirm whether you wish to remove all pledging information for this donor. Answer Yes if you do wish to do that, and it will be deleted.

### Reporting on Pledges

The reports on Pledge Information that are available vary, depending on which type of pledging data entry you selected, via the [Pledges tab](#) of **Maintenance** ⇒ **Main Window Options**.

Please see the details of the **Reports** ⇒ **Pledge sub-menu** for full information on the reports that are available.

You can also include the all relevant pledge-related fields in any [Custom Reports](#) that you create.

### Mail Merge Letters

Prior to version 3.35 of DONATION, in which more complex pledging was introduced, pledge-related [mail merge letters](#) were done via the Donor Information or Total Donations Information letters, which included (and still include) a «Pledge» [merge field](#), which is the donor's Annual Pledge amount, a «TotalAmount» field, and an «OutstandingAmount» field. The «OutstandingAmount» is the pledge amount (or 0, for donors with no Annual Pledge) minus the «TotalAmount» value. Note: For Donor Information letters, the «TotalAmount» is the total donated for the entire year, whereas for Total Donations Information letters, the «TotalAmount» is the total donated over date range within the year that you can specify.

However, starting in version 3.35, there is a new "Pledge Information" option for mail-merge letters, which is a better choice for writing to donors about their pledges and their donations towards fulfilling those pledges, both because when you are doing a [mass mailing](#) it selects only donors who have pledges, and because for the more complex pledging types, you can include all of the relevant data about the pledge and the donor's donations towards that pledge in the letters. Sample mail-merge letters are provided as the default letters for each of the three pledging types.

For more details on this, see the Help pages on [mass mailings](#) and [merge fields](#). The latter lists all of the merge fields that can be included in Pledge Information mail-merge letters, separated out by the pledging type selected on the [Pledges tab](#) of **Maintenance** ⇒ **Main Window Options**.

### Year-End Issues

There is some special treatment for the donors' pledge-related fields when [changing years](#) in the database, and also when you use the [Copy Missing Donors](#) feature. See those topics for details.

### Pledges and Fiscal Years

Normally a pledge is considered to be for all or part of a calendar year. However, if you have set up a fiscal year different from the calendar year in the **Maintenance** ⇒ **Organization Info window**, and checked the "Pledges are on a fiscal year basis" checkbox on the [Pledges tab](#) of **Maintenance** ⇒ **Main Window Options**, this all changes. (That checkbox is only available for the Simple Annual Pledge and Annual with Start Date and Category pledge types - introducing it for Multi-Year pledges would be too complicated.)

If you check the "Pledges are on a fiscal year basis" checkbox and are using the Annual with Start Date and Category pledge type, any existing pledge Start Dates you have entered will be ignored, and the editing window for pledges has the Start Date field removed. That is because pledges are then assumed to always be for an entire fiscal year.

There is a complication with data entry of pledge information when you are doing them on a fiscal year basis. The pledge information is part of the donor information, which is stored on a calendar year basis, so it is not obvious which fiscal year it should apply to. The way this is resolved is that once your fiscal year end has passed, you need to create any Pledge Information mail merge [letters](#) and pledge [reports](#) that you want for that fiscal year that just ended. (Of course, you can take your time doing this.) Once you have finished with that, make any changes to the donors' pledge data, to make it be for the next fiscal year, that has just started. You will then be able to use that revised pledge information in Pledge Information mail merge letters and pledge reports for the next fiscal year.

When you go to create Pledge Information mail merge letters and pledge reports (including [Custom Reports](#)), you may be prompted to specify which fiscal year you want them to be created for. There are actually three cases. To make this concrete, suppose your fiscal year starts on June 1, and you are in the 2016 calendar year.

1. If it is on or before your May 31, 2016 fiscal year end, the 2016 fiscal year (June 1, 2015 to May 31, 2016) will always be used, with a message explaining that fact.
2. If it is on or after your June 1, 2016 fiscal year start, but you have not yet initialized the 2017 year (with the **Maintenance** ⇒ **Change Year** [menu option](#)) and started entering donations for it, you will be prompted as to whether to use the prior fiscal year (June 1, 2015 to May 31, 2016) or the current fiscal year (June 1, 2016 to May 31, 2017).

- ## 10.2 Editing Multi-Year Pledge Details

In this case, the Annual Pledge field in the Donor Details area is not editable, and instead has a drop-down arrow added to it. You click on the drop-down arrow, or right-click in the field, and a popup menu appears with the option "Edit Pledge Details". Selecting that option takes you to the following window:

**Category:** If a Category other than "All Categories" was selected on the Pledges tab of **Maintenance ⇒ Main Window Options**, it will be automatically filled in here, and this field will not be editable. (However, if it was previously saved with a different Category value, that value will be displayed and will be editable.) Otherwise, you can leave it as "All Categories" (in which case all donations, for whatever Donation Category, will be considered to fulfill the pledge). Or, you can change it to a specific category. If it is set to a specific category (either automatically or by the user), only donations that have that as their Donation Category will be considered to fulfill the pledge.

**Start Date:** The start date for the entire multi-year pledge period.

**Years:** The number of years in the multi-year pledge period (1 to 10). Normally if you are using this window for multi-year pledging, however, you would not set Years to 1. If you are only ever handling single-year pledges, use one of the other options on the Pledges tab of **Maintenance** ⇒ **Main Window Options**. The exception would be if you are running a multi-year pledge campaign, but the occasional donor gives you only a single-year pledge within that campaign.

**End:** A field that the program calculates, which is the end date of the pledge period, based on the Start Date, Years and "First year pledge is for an entire year" setting. The calculation will be explained fully below.

**First year pledge is for an entire year:** If this checkbox is checked, then whether the Start Date is the first day of a working year or not, it is treated as if it was, i.e. the End date will be a year end date, (Years - 1) years later. If this is unchecked, the End date is one day earlier than the Start Date, Years years later.

To give an example, suppose the Start Date is March 1, 2015, and Years is 5. If "First year pledge is for an entire year" is checked, the End date will be December 31, 2019. However, if it is unchecked, the End date will be February 29, 2020. (2020 is a leap year.)

An additional point is that if Year is set to 1 (a single-year pledge), or the Start Date is any day in the first month of the year, the End date is always calculated as if "First year pledge is for an entire year" was checked, regardless.

If you are in a country like the United Kingdom, Australia or New Zealand and you are [Using Fiscal Data Entry and Receipting](#), and the Start Date is in a year that is a fiscal year, or any of the years included in the multi-year pledge period is a fiscal year, appropriate adjustments are made to the calculation of the End Date, and to the results of the **Calculate Year Amounts** button described below, using fiscal instead of calendar years for the calculations.

**Payment Frequency:** Allows you to select the frequency that the donor has specified they plan to make payments on this pledge - Monthly, Quarterly, Semi-Annual or Annual. This field is displayed on some of the [Pledge reports](#). Other than that, however, this field is not particularly relevant. Pledge amounts are not entered in this window based on the frequency - you can only enter the total annual amounts on this window.

**Calculate Year Amounts:** Clicking this button calculates (or re-calculates) the amounts out of the Pledge Total that will be due in each year of the pledge period, and displays them in a table showing Year and Amount. The amounts may not always be exactly equal, because they are rounded to the nearest \$1. In addition, if "First year pledge is for an entire year" is not checked, the first and last years will normally receive unequal shares, based on the proportions of a year (calendar or fiscal) that they each include.

**Allow Editing of Year Amounts:** If this is checked, after calculating the year by year pledge amounts with the **Calculate Year Amounts** button, you can further edit those amounts. This would be useful if the donor has informed you of specific unequal amounts that they plan to donate each year. However, if you edit the amounts, you must be careful to ensure that they still add up to the Pledge Total - you will not be able to save your changes on this window otherwise. If this checkbox is not checked, you cannot edit the Amounts in the table.

Individual year's amounts entered here can be \$0, though of course the total pledge cannot be \$0.

**Show:** Once you have entered all of the other fields, and done the **Calculate Year Amounts**, or at any point in the future when you re-enter this window for a donor with a pledge, you can click the **Show** button, and it will display both the outstanding amount (the pledge minus the amount donated to fulfill the pledge) for This Year, and the Total outstanding amount, for the entire pledge period. Note: in Canada when [split receipting](#) is used, the donation amount counted is the Eligible Amount, not the Total Amount. In all other cases and other countries, the amount is always the donation's Amount or Total Amount field.

The **OK** button saves your changes (after validating all of your entries), **Cancel** cancels any changes, and **Help** displays this help page.

After saving the changes with **OK**, the current year's pledge amount (not the total multi-year pledge amount! is redisplayed in the Donor Details area's Annual Pledge field, but that field is renamed to "Current Pledge".

**IMPORTANT:** After saving changes with OK on this window, your changes are not really saved unless you also click Save in the Donor Details area. Cancelling the changes in the Donor Details area will cancel the changes made in this window.

### 10.3 Editing Single Year Pledge Details

DONATION has three options for the entry of pledges. This page explains what happens if you select "Annual with Start Date and Category" on the [Pledges tab](#) of the **Maintenance ⇒ Main Window Options** window.

In this case, the Annual Pledge field in the Donor Details area is not editable, and instead has a drop-down arrow added to it. You click on the drop-down arrow, or right-click in the field, and a popup menu appears with the option "Edit Pledge Details". Selecting that option takes you to the following window:

The screenshot shows a window titled "Pledge details for Dan Cooperstock". Inside the window, there are three input fields: "Pledge Amount:" with an empty text box, "Category:" with a dropdown menu showing "All Categories", and "Start Date:" with a text box containing "01/01/2015". To the right of these fields is a section labeled "Outstanding Amount" which contains a "Show" button and an empty text box. At the bottom of the window are three buttons: "OK", "Cancel", and "Help".

This window allows you to enter pledge information for the current donor for the current year, with some details. The following notes explain each field:

**Pledge Amount:** This is the amount the donor is pledging for the current year.



If you ever wish to entirely clear out a donor's single-year pledge that has been previously entered, clear the Pledge Amount field, click OK, and answer the message box question that comes up appropriately, to allow all data on this window to be cleared.

**Category:** If a Category other than "All Categories" was selected on the Pledges tab of **Maintenance** ⇒ **Main Window Options**, it will be automatically filled in here, and this field will not be editable. (However, if it was previously saved with a different Category value, that value will be displayed and will be editable.) Otherwise, you can leave it as "All Categories" (in which case all donations, for whatever Donation Category, will be considered to fulfill the pledge). Or, you can change it to a specific category. If it is set to a specific category (either automatically or by the user), only donations that have that as their Donation Category will be considered to fulfill the pledge.

**Start Date:** The start date for the current year's pledge. This defaults to the first day of the current working year (January 1, as long as you are working on a calendar year basis).

Note: The end of the pledge period is always assumed to be the year end of the current working year.

However, if you have selected the "Pledges are on a fiscal year basis" checkbox on the Pledges tab of **Maintenance** ⇒ **Main Window Options**, the Start Date field is not displayed, and any previously entered Start Dates for this type of pledge are ignored. When that checkbox is checked, all "Annual with Start Date and Category" type pledges are considered to be for an entire fiscal year. See [Pledges and Fiscal Years](#) for more information.

The exception to that is if you are in a country like the United Kingdom, Australia or New Zealand and you are [Using Fiscal Data Entry and Receipting](#), and are in a year that is a fiscal year, in which case the Start Date can be entered, as any date in that fiscal year, and the pledge period is assumed to the fiscal year end. In this case the "Pledges are on a fiscal year basis" setting is ignored, and doesn't change the behaviour.

**Show:** Once you have entered all of the other fields, or at any point in the future when you re-enter this window for a donor with a pledge, you can click the **Show** button, and it will display the outstanding amount (the pledge minus the amount donated to fulfill the pledge) for the current year. Note: in Canada when [split receipting](#) is used, the donation amount counted is the Eligible Amount, not the Total Amount. In all other cases and other countries, the amount is always the donation's Amount or Total Amount field.

The **OK** button saves your changes (after validating all of your entries), **Cancel** cancels any changes, and **Help** displays this help page.

After saving the changes with **OK**, the current year's pledge amount is redisplayed in the Donor Details area's Annual Pledge field.

**IMPORTANT:** After saving changes with OK on this window, your changes are not really saved unless you also click Save in the Donor Details area. Cancelling the changes in the Donor Details area will cancel the changes made in this window.



## 11 ENTERING AND MAINTAINING DONATIONS

### 11.1 Entering and Maintaining Donations

Not surprisingly, given the name of this program, this is the activity you will perform most frequently. Of course, you always have to enter the basic information for a donor before you can enter donations for them. Assuming the donor has already been entered, first find them as explained under [Finding a Donor](#). Any existing donations from this donor will be listed in the Donations area of the main window, in order by Date.

[Entering New Donations Individually](#)

[Entering Multiple Donations for One Date](#)

[Editing a Donation](#)

[Deleting a Donation](#)

[Changing the Date of Donations](#)

[Handling Gifts In Kind](#)

[Handling Anonymous Donations](#)

[Recurring Donations](#)

[Using the Popup Calendar to Enter Dates](#)

See Also: [Editing Main Window Options](#) for details on options relevant to editing donations.

### 11.2 Entering New Donations

There are three ways to enter donations in this program:

- The first way is one at a time, by [finding a donor](#), and entering one or more lines of donation for them on the main window, then going on to another donor.
- The second way, described in the section on [Entering Multiple Donations for One Date](#), is to bring up a list of all donors in order by name or Member/Envelope #, and enter donations for all of them for one date. This is called "Batch Entry". Churches would commonly use this second method for entering their Sunday collections.
- The third way, described in the section on [Importing Donations or Regular Donations](#) is for one-time imports when you first start using the program, or for handling regular (for example monthly) donations from the same donors.

This section describes only the first method - using the main window.

Whenever a donor has been selected on the main window's Donor List, their donor details are displayed on the right, and any existing donations for them are displayed on the bottom, along with an "empty" line for entering a new donation. (The order those donations are displayed in is based on the Sort Order setting in the Donations tab of the **Maintenance ⇒ Main Menu Options window**.) The "empty" line for a new donation will have the current default Date already filled in, along with the default Category and optionally default Cheque # / Paid By field, as set on the options in the Donations tab of the **Maintenance ⇒ Main Menu Options window**. Unless you edit and save the "empty" line, it will not be saved in the database and will not be included in any receipt you create for this donor.

To edit that empty line in order to actually enter a new donation, either click into it with your mouse, or press **F2** (which is the same as the menu option **File ⇒ Edit New Donation**).

There are up to six fields to fill in: Date, Amount or Total Amount, Category, Cheque No / Paid By, optionally Eligible Amount, and optionally Description. The Recpt # field, which is displayed, is not editable - it gets filled in automatically when you create a receipt for that donor, and print it. (You can make the Description field disappear, if you don't want to use it, and the Eligible Amount field appear, if you do want it, via options in the Donations tab of the **Maintenance** ⇒ **Main Menu Options** [window](#).)

Note: Pressing **F2** merely moves the cursor into the line for the new donation, so you don't have to use your mouse. By default, it moves you to the Date field, but this can be changed to instead move you to the Amount field by changing the Cursor Field after F2 setting in the Donations tab of the **Maintenance** ⇒ **Main Menu Options** [window](#). If you do make that change, which is useful if you often enter a number of donations for the same date on the main window, instead of using the [One Date Batch Entry](#) window, please be careful to check that the Date field, which you are skipping over, has the correct date in it!

### **Donation Fields**

#### **Date:**

This is entered in the short date format set in the Windows Control Panel's Regional and Language Options (usually either MM/DD/YYYY or DD/MM/YYYY). (See [Currency and Date Formats](#) for more details.) This defaults to today's date (or the last year end if you are still entering last year's entries) for the first entry you make after starting the program. Subsequently, it defaults to the date you used with the previous donation you entered. If you like the default date, just press **Tab** to move right on to entering the Amount.

Normally, only dates in the current calendar year are allowed. However, if you are in a country like the United Kingdom, Australia or New Zealand and you are [Using Fiscal Data Entry and Receipting](#), and you are working on a year that is a fiscal year, only dates in the current working fiscal year are allowed.

You can type donation dates in directly, or you can click on the down arrow to the right of the date, which pops up a calendar that you can use. Details on how to use the calendar are in [Using the Popup Calendar to Enter Dates](#).

You can also use the **+** and **-** keys, either on the top row of your keyboard or on the numeric keypad, to increase or decrease the date by one day respectively. (This is similar to a feature in Quicken, QuickBooks and perhaps other accounting programs.) For the **+** on the top row of your keyboard, you can actually also use its unshifted form **=**, so you don't have to press Shift with it. Also, pressing the "T" (for "Today") key on your keyboard changes it to the current date, as long as that is in the current year you are working on. Further special keys for dates are listed in [Keyboard Shortcuts](#).

Finally, you can optionally enter only the month and day parts of the date, and leave off the year - the program will fill in the year for you. For instance, if your date format is MM/DD/YYYY, and you enter just 1/31 when you are working on the 2016 year, it will replace it with 1/31/2016 when you Tab or click out of the field.

Note: You can only enter donations dated within the current calendar or fiscal year that you are working on, as explained above. That year is indicated in the title bar of the program (for example "DONATION 2016 data for *Your Organization Name*", or "DONATION FY2015/2016

data for *Your Organization Name*" if you are working on a fiscal year). To start entering donations for a new year, please see [Year-End Procedures](#).

**Amount** (instead called **Total Amount** if the Eligible Amount field is also displayed):

This may be any amount, and is usually required to be over \$0. You can't enter the dollar sign, and you don't have to enter commas or any decimals if it is a round number. I.e. for fifty dollars, just enter "50". For one thousand dollars, just enter "1000".

If you wish to be able to enter amounts of \$0, you can check the "Allow \$0.00" checkbox on the [Donations](#) tab of the **Maintenance ⇒ Main Window Options** window. If you do this, entering \$0 is still only allowed if you also enter a Description for this donation. You might want to enter \$0 for [Gifts In Kind](#) for which you are not providing a valuation (though not in Canada), or for cheques that you have entered, and then come back NSF from the bank. (More commonly, however, you would handle that case by just deleting the donation.)

If you want to be able to enter negative amounts, for instance to enter "reversing entries" for cheques that come back NSF, you can check the "Allow Negative Amounts" checkbox on the Donations tab of the **Maintenance ⇒ Main Window Options** window. If you do this and enter negative amounts, this will be included on receipts as long as the donation is receiptable. (We recommend instead just deleting donations that come back NSF.) Donations with negative amounts will never be included in a [Bank Deposit](#).

In the case where the Eligible Amount field is also displayed, please see the details on that field (below) in order to understand the difference between the Amount or Total Amount field and the Eligible Amount field.

All currency fields are displayed in the format shown in Windows Control Panel's Regional and Language Options tool.

### **Category:**

You can select values from this drop-down list that have been set up on the **Maintenance ⇒ Donation Categories** [window](#).

As with the Donor categories, "autocomplete" is used: you can type in a letter or letters that are the initial part of the value you want to select and have the rest appear. For instance, if you have both General and Garden as categories, typing "g" or "G" will cause it to show Garden (with "arden" highlighted so it will be overwritten if you keep typing), and then typing "e" will cause it to show General.) Alternatively, click on the small down arrow button at the right of the field and select the category from the scrolling list that appears. The categories are displayed in alphabetical order.

There is also always an "<Add New>" option on the drop-down list of Categories. Selecting it brings up that window, pre-set to add a new category. On return from that window, the last one you added (if any) is immediately put into this field.

The Category field for a new donation defaults to whatever has been set as the Default Category in the [Donations](#) tab of the **Maintenance ⇒ Main Window Options** window, or to "General" if you haven't changed the Default Category there. If that default value that comes up is correct, you are done.

See [Non-Receiptable Donors and Donations](#) for ways to mark Donation Categories as Non-Receiptable, so that donations with those categories will never be included in a charitable receipt created with the Receipt menu options.

Some categories you select may be too long to fit within the display area for the category on the main window. To allow you to see what the full value is, as your mouse hovers over that field, the entire value pops up in a "tooltip", even if it is short enough to see all of it.

### **Cheque No / Paid By:**

This field allows you to specify how the donation was paid. It can be left blank if you aren't interested in tracking this information.

For a cheque, you can enter just the cheque number. If you do that, any report or receipt section that totals donation amounts by the Cheque # / Paid By field values will total all such donations, which just have numbers in this field, under the heading "Cheque" (or "Check" for the USA).

You can also enter any text in this field that you want to enter, but by using the drop-down button (or just typing the first letters in one of the entries on the drop-down list), you can choose from several pre-defined standard entries, which are initially "Cash", "VISA", "MasterCard", "Money Order", "Credit Card" (for ones other than VISA and M/C), "Debit Card", "[Gift in Kind](#)", "PAC" (Pre-Authorized Chequing), "PAR" (Pre-Authorized Remittance - a specific program of the United Church of Canada), "PayPal", "Non-Receiptable" or "Pre-Receipted".

This field also has "autocomplete", as for the Category, so if you type the first letters of an entry on the drop-down list, it will appear.

You can change the list of pre-defined entries in this field, whether you wish to add entries or delete ones you don't need, with the **Maintenance** ⇒ **Donation Paid By Values** [menu option](#).

The field also has an "<Add New>" option on the list. Selecting it brings up that same window, pre-set to add a new Paid By value. On return from that window, the last one you added (if any) is immediately put into this field.

Both "Non-Receiptable" and "Pre-Receipted" are special "magic" entries that will prevent this donation from ever being included in a charitable receipt created with the Receipt menu options. Use them for types of income that are not eligible to be part of a charitable receipt, or for "flow-through" money that came to you from this donor but which has already received a receipt from a 3rd party source, such as an Internet charitable donation service or the United Way. (For other ways to prevent individual donations, or all donations from a given donor, from being receipted, please see [Non-Receiptable Donors and Donations](#).)

If most of your donations use the same Cheque No / Paid By value, you can set that up as the Default Paid By value in the [Donations](#) tab of the **Maintenance** ⇒ **Main Window Options** window. If you do so, it will be automatically filled in whenever you create a new donation, whether on the main window, or on the One Date Batch Entry [window](#). Of course, if you use a default in this way, be very careful to change the value for individual donations whose Cheque No / Paid By value doesn't happen to correspond to the default value.

**Warning:** If you do not have a Default Paid By value, so that the field comes up blank for new donations, do not just use the down arrow key to navigate through the list of options without actually dropping down the list by clicking the drop-down arrow. If you do that, because the first item on the list is always "<Add New>", that will immediately select that item, and then pop up the window for adding another Paid By value! Just using the arrow keys to navigate through the list of options is not efficient in any case: dropping down the list and using your mouse to make selections, or typing the first letters of your desired selection until it comes up, are both far easier.

It is up to you whether the Cheque No / Paid By field is printed on the charitable receipts. You get it if the "Also Cheque Number" radio button in the section for **Details Include** on the **Maintenance** ⇒ **Receipt Options** [window](#) is selected.

For U.S. users, "Cheque" is spelled "Check" throughout the program, including in the name of this field, and on receipts if the field is being printed on them.

#### **Recpt #:**

This is a non-editable field. It will be automatically filled-in with the receipt number after a receipt has been created for this donation and printed, emailed or saved to a PDF file. Note that if the issued receipt number is (say) 2017-00012, you will just see "12" here. If one receipt has been issued covering several donations from the same donor, the same number will appear in the Recpt # column for each of those donations.

#### **Description:**

This optional field, that can be left blank if it not needed, allows you to enter up to 50 characters of description for this donation. That could be used for the description of [Gifts In Kind](#) (if you are choosing to enter them) or for annotations such as "In loving memory of my friend, Jim Smith" that you might want to print on a receipt. You can also use it to record anything else you wish to record.

The Description prints on some of the Donation reports that have room for it (including **Reports** ⇒ **Donation** ⇒ **Current Donor** and **Reports** ⇒ **Donation** ⇒ **Details, One Page Per Donor**). It also optionally prints on the receipts, if you select the "Also Description" radio button in the **Details Include** section of the **Maintenance** ⇒ **Receipt Options** [window](#).

You can control whether the Description field is displayed in the Donations area of the main window with an option on the [Donations](#) tab of the **Maintenance** ⇒ **Main Window Options** window.

If you have also selected the checkbox for "Drop-down arrow on the Description Field, for editing the Appraiser" on the Donations tab of the **Maintenance** ⇒ **Main Window Options** window, a drop-down arrow (as for a drop-down list) appears at the right of the Description field. If you click it (or if you right-click in the Description field) a popup menu appears, with an option to edit the appraiser information for this donation. To the best of our knowledge, this is only applicable to Canadian Gift in Kind donations, and only required for largish donations. (See [Gifts in Kind](#) for more details.)

For Canadian donations with Advantage, a description of the Advantage is also required. It can be entered in this Description field, as long as the donation is not **also** a Gift in Kind, in

which case the description in this field is for the Gift in Kind, and the description of the Advantage must go into the Advantage Description field described below.

### **Eligible Amount:**

This optional field allows you to enter the amount of a donation that is eligible for a tax deduction, when part of the donor's total amount donated is for goods or services that the donor receives in return for their gift. (Note: this has nothing to do with [Gifts in Kind](#).) The Canada Revenue Agency calls the value of the goods or services that the donor receives an "advantage".

An example of this is a fundraising dinner. Suppose the donors buy tickets costing \$100 for a fundraising dinner, and the fair market value of the dinner that the donors will receive is \$40. That means that only \$60 of the donor's donation is eligible to be included on a charitable receipt. The way you enter this is to enter \$100 for the Amount, and \$60 for the Eligible Amount. The Eligible Amount is what the donor can claim on their taxes.

If a donation does not involve an "advantage", for example the donor has not received anything back in exchange for their donation, do **not** enter the Eligible Amount field - only enter the Total Amount. The Eligible Amount, if entered, must be less than the Total Amount.

**Note:** The Canada Revenue Agency regulations calls this "split receipting". They require the separate display of the following fields on a receipt:

- the total cash amount of the donation received by the charity
- the value of the advantage (what the donor received), and
- the eligible amount of gift for tax purposes.

All receipts for Canada or Quebec show all three of these lines, but only if an Eligible Amount has been entered. If there is no Eligible Amount, and thus no advantage, only the last of those three lines is required, only it is printed on receipts.

You can control whether the Eligible Amount field is displayed in the Donations area of the main window with an option on the [Donations](#) tab of the **Maintenance ⇒ Main Window Options** window.

**Note for users in the U.S.A. and other countries:** Very few users in the U.S.A. seem to want to do this type of "split receipting" that is used in Canada, so at this point the DONATION program's receipts for the U.S.A. always show just the regular Amount (or Total Amount) field. If you do want to do split receipting, you **can** use the Eligible Amount field, but you will need to [contact us](#) for a special version of the [mail-merge receipt](#) for the U.S.A. that displays it.

Receipts for all other non-Canadian countries use the Eligible Amount, if it is entered, and otherwise use the regular Amount (or Total Amount) field.

Please see [Donations and Receipts with Advantage](#) for full details on this.

### **Advantage Description** (shown as "Descr. of Advantage" on the main window):

This can be used to enter the description of the advantage, as explained in the previous section on the Eligible Amount field, which is required by the Canada Revenue Agency to be



printed on such receipts. However, unless the donation is also a [Gift in Kind](#), the description of the advantage can alternatively be entered in the regular Description field. So this field is only really necessary for donations with advantage that are Gifts in Kind.

This field is only displayed if you select to do so with an option on the [Donations](#) tab of the **Maintenance** ⇒ **Main Window Options** window.

The Eligible Amount and the Advantage Description can be only entered when you do your entry of donations on the main window, not via [Batch Entry](#).

As with the Eligible Amount field, please see [Donations and Receipts with Advantage](#) for full details on this field.

### Finishing Editing Donations

Just like when you are editing donors, when you are done you press **Enter** or **F10**, or click the **Save** button, or select **File** ⇒ **Save Changes**. If you decide you did not want to enter a new donation after all, press **ESC**, or click the **Cancel** button, or select **File** ⇒ **Cancel Changes**. (Note that you can't do anything else in the program until you choose one of those two options to finish or cancel entering the new donation.)

You will see that two totals are always displayed at the bottom of the donations area. The one on the left, titled "Total", is the total of the donations for this donor this year. The one on the right, titled "Total for MM/DD/YYYY", is the total of the donations for this donor that were made on the date of the currently highlighted donation. (This can help you confirm that you have entered all of the required lines for a donation that is split up over several categories.)

If you want to double-check the total donations you made on one day (with the same entry Date), you can use one or more of the options in the **Reports** ⇒ **One Date Donation** [report](#).

### Donations in Multiple Currencies

DONATION has no special features for accepting donations in multiple currencies. Here are some hints for how to use the program if you do have donations in multiple currencies.

Some of our users who have charitable registrations in two countries (such as Canada and the U.S.A.) have set up two databases, one for each country. The Help topic [Switching Databases](#) explains how you can set that up, and switch between the databases. That would allow you to use the appropriate receipt formats for each one, set in the **Maintenance** ⇒ **Receipt Options** [window](#).

If you only have a charitable registration in one country (I will use Canada as an example, with currency C\$) and get some donations in another country's currency (say US\$), there are actually two cases:

1. Those donations are from Canadian donors, who should thus get a tax receipt. In that case you should probably deposit the donation in your bank and determine the Canadian dollar equivalent, and enter that into DONATION. (If it's some form of online or electronic payment, determine the C\$ equivalent in whatever way makes sense for that payment method.) Then the receipt will properly be for the C\$ amount.



2. Those donations are not from Canadian donors. They will not be able to use a Canadian tax receipt, so you should set the donor to be [Non Receiptable](#). Then what some users have done is first, enter their donation as the original amount in the other currency, such as US\$. Then send them a mail merge thank you [letter](#) for that amount. Then after that is done, change the amount to the converted amount in C\$, so that your totals in reports add up correctly.

## 11.3 Currency and Date Formats in the Program

The DONATION program does not directly control the currency or date formats or symbols it uses for data entry and reporting.

They are both controlled by Windows Control Panel's "Regional and Language Options" tool. (It may be called other similar things, depending on your version of Windows.)

If you do not like the default date or currency formats used by the program, you can change them in that tool in Control Panel. However, please note that changes you make there may affect many other programs on your computer as well.

The one exception to this is the [OnDemand Version](#), where the currency formats cannot be changed from the U.S. and Canadian format, and the date formats are controlled by the **Maintenance** ⇒ **Date Formats** [menu option](#).

## 11.4 Entering Multiple Donations for One Date

For organizations such as churches that have Sunday (or other day) collections or offerings, where a large percentage of their donors make donations on the same date, you can use **File** ⇒ **One Date Batch Entry** to bring up a window listing each donor, with a place to enter the Amount, Category, and optionally the Cheque No / Paid By and Description for the donation that each donor gave that day. You can also access this window via the **Batch Entry** button above the donations area on the main window.

This window can be used both to enter new donations, and to edit existing donations. All existing donations for the selected date can optionally be displayed, along with spaces to enter new donations for all of the other donors. The only existing donations that are not displayed are ones that have already been included in a charitable receipt, because they can't be edited anyways.

### Specifying Options

When you select **File** ⇒ **One Date Batch Entry** or click the **Batch Entry** button, the first thing that appears is some version of the following options dialog:

**One Date Batch Entry Options**

Enter Donations for Date: 12/31/2018

☐ **I**nclude existing donations for the specified date

Batch Description: 2:27 PM

With default category: General

First split donor category:

Second split donor category:

Display Fields: ☒ Cheque # / Paid By  
☐ Description

You may also enter one or more criteria. Only Donors matching the criteria will be displayed.

Donor Category 1:

Donor Category 2:

☐ **O**nly show donors who have donated this year

OK Cancel Help

### Date

The main thing that you must always set on this window is the date for entry of donations. All donations entered with this window will go in for the same one date that is specified here. If you do not change the date, you will be prompted to confirm that this is indeed your desired donation date. (This helps to prevent errors.)

### Include Existing Donations

The next thing is a checkbox for **Include existing donations for the specified date**. If this is checked, any existing donations for the given date are displayed, so that you can edit them, and there are also blank rows for all other donors that did not have donations on that date. If this is unchecked, there is just one blank row for each donor. Changes you make to this selection are also remembered between uses of this window. (See the next section on Batches for some further cases.)

**Note:** even if you check **Include existing donations for the specified date**, donations that have already been included in a receipt are not displayed. (You can tell they have been included in a receipt if you see a **Recpt #** for them in the Donation Details area of the program's main window.) This omission of receipted donations on this window is because such donations cannot be edited, and the only reason to bring them back up on this window would

be edit them. If you just want to see them again, use one of the options for the **Reports ⇒ One Date Donation report**. If you need to make changes to receipted donations, see [Corrected Receipts](#).

If you have configured [Abundant](#) online donations, any imported Abundant donations will also never be displayed in this window. Since they were entered by importing, rather than by direct entry on the main window or by this batch entry method, it does not make sense to display them here.

### Batches

Below that is a row that either says **Batch Description**, with an entry field, or **In Batch** with a drop-down, or the entire row might be omitted. This was added in release 4.30 of DONATION.

The point of batch descriptions is for organizations, usually churches, that do two or more Batch Entries on some days, and want to be able to report separately on them, with the **Reports ⇒ One Date Donation report**. If you never do that, you can uncheck the checkbox **Use Batch Descriptions** on the Donations tab of the **Maintenance ⇒ Main Window Options window**, and this row of this window, and other associated features, will not be shown to you.

Otherwise, when **Include existing donations for the specified date** is **not** checked, you will see **Batch Description** here, with an entry field, initialized to the current time in your Windows Control Panel short time format. You can edit that field as desired, adding a description of this batch, or even replacing the time with your description.

When **Include existing donations for the specified date** is checked, you will instead see **In Batch**, with a drop-down list that defaults to showing the most recently entered Batch Description for the current date, if any. That is the one you are most likely to want to edit. The drop-down list is in order of most recently entered first, with all "All" at the bottom of the list, or as the only entry on the list if you haven't previously saved any batches on this date.

If you pick a batch description **other than** "All" on that drop-down list, only the donations that were part of that batch will be redisplayed. If you pick "All" from this list when you are including existing donations for the specified date, you will see all donations for the current date, whatever batch they were in (or even if they were entered on the main window), and new donations that you enter will not be part of a named batch.

### Default Donation Category

You can also change the default donation category for the donations to be entered, via the **With default category** field on this Options window, overriding the default set on the Donations tab of the **Maintenance ⇒ Main Window Options window**. If you have multiple offerings or collections to enter which are for different services or campaigns, and which are each mostly for one category (but different categories between the two services or campaigns), just use **One Date Batch Entry** twice, setting the desired donation category on the Options window each time. Please note that changes to the default category made here are not remembered between uses of the window - it always starts up showing the default set in **Maintenance ⇒ Main Window Options**.

### Split Donor Categories

Another option is to enter multiple categories of donations in one batch. If you are going to do that, you can set the **First split donor category** field and also optionally the **Second split donor category** field. (These values are remembered between uses of this window.) If you set them, and then when you are in the main batch entry window you use the **Split Donor** button, different things happen depending on how many rows of donations are already present for that donor. If there is only one row for the donor, the donation category set in **First split donor category** is used (or the category is left blank if that was not set). If there are exactly two rows for the donor, the donation category set in **Second split donor category** is used (or the category is left blank if that was not set). And if there are three or more rows for the donor, the donation category in any split row you create is always initially left blank.

A third option for handling multiple categories of donations in one collection is to use the **Split All** button in the main batch entry window. It is described below, in the section on Data Entry. It would be used if a significant percentage of your donors all have donations in the same two or more categories.

#### Display Fields

On this same options window, you can also specify whether or not you want to see the Cheque # / Paid By and Donation fields on the main batch entry window. Changes you make to those selections are remembered between uses of this window. If you have set a Default Paid By value on the Donations tab of the **Maintenance ⇒ Main Window Options** [window](#), it will always be used for the initial value of the Cheque # / Paid By field for each donation, whether or not that field is displayed.

The fields [Eligible Amount](#) and [Advantage Description](#) cannot be entered via the Batch Entry window - they must be entered, if needed, on the program's main window.

#### **Moving on to Entering the Donations**

Once the date that is displayed is the desired date, and you have changed the donation category and any other options if desired, if you want to see all donors displayed (which will be by far the most common choice), just click **OK** or press **Enter** on the Options window. Details of what else you can do with this options window to restrict the donors that are displayed are described [below](#).

At this point the main window for entering your batch of donations is displayed. Here is one small example of that window, though the exact appearance will depend partly on your selections in the previous window displayed above, and partly on some defaults in the program:

Donor Name	Member/Env #	Amount	Category	Cheque # / Paid By
12345678901234567890123456	123456789		General	Cash
Abbey-Smith-Jones, Edwin & Vi	1		General	Cash
ADAMS, CAROL	123		General	Cash
Adams, Jim			General	Cash
Adams, Larry			General	Cash

Count Cash      Total: \$0.00      Totals by Category

The title of this window will change a bit depending on whether you are creating a new batch entry, or editing an existing one with the **Include existing donations for the specified date** checkbox checked, and whether you are working on a specific named batch, as explained above.

### Sorting the Rows

On this window, you can decide in which order you want to see the donors listed. The default order is by Donor Name. If you prefer to see them sorted by Member/Envelope Number, click the "Member/Env #" radio button. This sort order is remembered between your uses of this window.

### Data Entry

Then, just go down the list of donors, entering the donation Amount, Category (when it differs from the default one) and optionally Cheque No / Paid By and Description fields for each donor that made a donation on this date.

It's important to note that none of your changes will be saved until you press the **Save** button, which exits the window.

You will notice that there is initially only one line for each donor. If a donor made a donation that has to be split between two or more Categories, then after you finish entering the first donation, click the **Split Donor** button (or press **Alt+D**) and it will insert another empty line for that donor. Fill that in, and if necessary repeat these steps to put in further splits for this donation. The category for a line added with **Split Donor** depends on the settings in the Options window's **First split donor category** and **Second split donor category** fields. See above for full details.

Just like when you are [entering donations](#) on the program's main window, the Category drop-down list shows all categories that have been set up on the **Maintenance ⇒ Donation Categories** [window](#), and you can use "autocomplete", typing initial parts of the desired category to cause it to appear. There is also always an "<Add New>" option on the drop-down list of Categories. Selecting it brings up that window, pre-set to add a new category.

Some categories you select may be too long to fit within the display area for the category on this window. To allow you to see what the full value is, as your mouse hovers over that field, the entire value pops up in a "tooltip", even if it is short enough to see all of it.

Clicking the **Split All** button (or pressing **Alt+P**) on this window prompts you to select a category (other than the default category or any others you have already added with Split All), and then adds a row for each donor, with no amount, and with the selected category. This would be useful, as an alternative to using **Split Donor** repeatedly, if you have a collection in which most or all of the donors gave to the same two or more categories.

Please note that unlike entering donations on the main window, you cannot enter donations of \$0 on this window, even if you have allowed that in the [Donations](#) tab of the **Maintenance ⇒ Main Window Options** window. You also similarly cannot enter negative amounts for donations on this window, even if you have allowed that in the Donations tab of the **Maintenance ⇒ Main Window Options** window. Our assumption is that entering \$0 or negative donations will only be done in exceptional circumstances, and as such does not need to be allowed on this window, which is for speeding up routine data entry.

You can move from row to row of this window with the **Enter** or **Down Arrow** keys (which take you to the same column in the next row), or the **Tab** key (which takes you across the fields of one row, then down to the next row).

#### Copying Previous Donations

In some churches, many users repeat the same donation (either for a single category or split between multiple categories) in most weeks. To simplify entering such donations when they are split, the field to the right of the **Copy Prev** button at the top of the window shows the amount that the current donor gave most recently. (Only donations made within the last two months, prior to this batch's entry date, are considered.) In addition, if you hover your mouse over the Name or Member/Env # field for a donor, the latest donation details, including any splits between multiple categories, are displayed in a popup tooltip.

The **Copy Prev** button is only enabled when there is actually at least one previous donation from that donor within the last two months, prior to the entry date you are working on. It will copy the latest donation or donations (if there were split donations on the same latest date that there are donations for this donor).

If you click **Copy Prev** (or press **Alt+C**) when it is enabled, you are prompted as to whether you want to re-enter that donation or those donations for that donor for the current entry date. This can only be done if you have not entered any Amount values for this donor so far during this batch entry. If you answer Yes to the question that comes up, that amount or those amounts are entered. If you are displaying the Cheque # / Paid By and/or Description fields, whichever of them are displayed are also copied in from the previous donation(s) being copied. However, if the previous Cheque # / Paid By value was an actual cheque number, only "Cheque" or "Check" (for the U.S.A.) is copied in. If the new donation is also by cheque, you can then enter its number directly if you wish.

One slightly tricky point is that normally after **Copy Prev** is finished, the cursor ends up in the Amount field on the last row copied in. However, when the previous donations had an actual cheque number, and so "Cheque" or "Check" was copied in, the cursor ends up in the Cheque # / Paid By field on the first row entered, so you can enter what will presumably be a new cheque number for the new donation.



**Note:** This is **not** a recommended way to enter recurring pre-authorized donations. Those can much more conveniently be done via importing, with the **Database ⇒ Import ⇒ Donations** [menu option](#) or the **Database ⇒ Import ⇒ PAR Donations** [menu option](#) (for those using the United Church of Canada's PAR program).

### Finding Donors

If you have many more donors in your list than you have donations to enter on this date, finding the donors may require a certain amount of scrolling. You can avoid that by using the **Find Donor** button (or **Alt+F**) to [find a donor](#) by part of its name, its member/envelope number, phone number, address or email. (This is basically the same function as **File ⇒ Find Donor** on the main window.)

It may seem odd that you are able to find by phone number, address or email on this window, although you cannot immediately see the values in those fields. However, this window has a popup tooltip, when you hover your mouse over the Name field for a donor, that displays any of the phone number, address, and email fields that have been filled in. So that way you can check it's the right donor that you have found. As mentioned above, that tooltip also includes the latest donation information for the donor.

### Checking your Work and Counting Cash

If you are working from input sheets that have subtotaled the day's entries by donation category, and want to make sure that you have entered everything properly before saving, you can click the **Totals by Category** button at the bottom of the window, beside the overall total. That will tell you how many donors you have made donations for, how many individual donations that includes, the dollar total, and a breakdown of numbers of donations and dollar amounts by donation category.

If you want to [count cash](#) that came in as part of this batch, click the **Count Cash** button at the bottom of the window. That will bring up a window for counting cash, and try to ensure that it matches the total of cash donations you have entered as part of the batch. (Cash donations are considered to be ones where the Cheque # / Paid By value you entered exactly matches the "Word for Cash" recorded on the **Donations** [tab](#) of **Maintenance ⇒ Main Window Options**.)

### Saving your Work

When you are done, click the **Save** button to save all of the donations that you entered back to the database. It will tell you how many entries you made and their total, and ask you to confirm that you want to save them.

If you decide you do not want to save any of the entries that you may have made, click the **Cancel** button and no changes will be made to the database, after confirming with you that it is OK to do so (assuming there were in fact changes).

Both the **Save** button and the **Cancel** button (if you confirm the cancel) exit this window. Of course, **Save** only exits the window once the saving is completed! If you need to come back after that to make more entries for the same date, you can come back into it, this time checking the "Include existing donations for the specified date" checkbox in the first window, if you want to see any donations you have previously entered and saved.



If you want to further double-check the total donations you made on one day (with the same entry Date), you can use one or more of the options of the **Reports ⇒ One Date Donation report**.

If you use member or envelope numbers, you can also use the option in **Reports ⇒ One Date Donation** that shows that column, for checking your entries. These reports have two "Member / Envelope # Checksum" values at the bottom. The first value is just the sum of all distinct envelope numbers that appear in the report. The second is the sum of all envelope numbers that appear in the report, adding in a number multiple times if there are multiple donations listed with the same number (for example splits). Either one can be used as a double-check that you entered the donations for the correct donors, if you add the envelope numbers up with a calculator before doing your entries. If your calculator total differs from the Member / Envelope # Checksum displayed, either you added them up incorrectly on the calculator, or you entered one or more donations for the wrong donor.

If you find any errors, you can either fix them individually on the main window, or go back in to One Date Batch Entry again to fix them, being sure to check the "Include existing donations for the specified date" checkbox.

#### Adding Donors

Sometimes you may be entering your donations and realize that there are new donors. You can add one and continue entering your donations, by using the **Add Donor** button or **Alt+A**.

That brings up a version of the main window with only the Donor Details area on it, and with a blank donor displayed for you to enter. Fill in the desired details, then click **Save**, or click **Cancel** if you do not want to save it. When you click either of these buttons, or otherwise close that window, you are returned to the main batch entry window, with the new donor selected if you saved one.

More details about entering donors, which largely apply to this window as well, are in the Help topic [Entering a New Donor](#).

#### Fixing Date Errors

If you complete a session with One Date Batch Entry, Save the entries, and then realize that you specified the wrong date for the donations you just entered, you can fix this with the **Database ⇒ Change Date of Donations menu option**.

#### Selecting Criteria for Donors

If you wish, you can use the "One Date Batch Entry Options" window that comes up when you first select **File ⇒ One Date Batch Entry** to restrict the donors that it shows to you. You can restrict them based on the value in the Donor Category 1 or Donor Category 2 fields, or you can restrict them to only those who have already donated in the current year.

If you wish to restrict them to donors in a certain donor category, just pull down the appropriate drop-down list for that category, and select the desired value from it. An example of when you might want to do this would be if you have given a certain category value to those of your donors who are interested in a certain project, and the collection you are entering is entirely for

that project. Or, you might give a category value to your regular donors, who commonly give in collections, and select that value.

To select only those who have already donated in the current year, select the checkbox titled "Only show donors who have donated this year". Checking this would be helpful if you had a lot of regular donors, and quite a few others in your list of donors who currently aren't donating, to avoid having to see those others.

When you have made the desired selections, click **OK**, and it will restrict the list according to your specifications. If you don't want a restricted list, just don't select any criteria.

## 11.5 Editing a Donation

To edit a previously-entered donation, first [find the donor](#), then if necessary scroll to the desired donation in the Donations area of the main window. The currently selected donation has a pointing hand icon to the left of it.

Once you have found the donation, you can edit its information to correct errors. Simply click into any of the fields in the Donations area and start making changes. Just like when you are entering a new donation, press **Enter** or **F10** to save the changes, or **ESC** if you wish to cancel your changes. (You can't do anything else in the program until you choose one of those two options to finish editing.)

### Uneditable Donations and Donation Fields

As explained in detail in the following sections of this page, the following cannot be edited directly on the main window, and are thus "greyed out" with a darker background, to indicate that fact:

- Any prior year donations that are displayed.
- Receipted donations with a value in their Recpt # field.
- The Date, Amount, Cheque # / Paid By and Abundant Batch # fields of imported [Abundant](#) online donations.

### Editing Prior Year Donations

There are options on the [Donations](#) tab of **Maintenance** ⇒ **Main Window Options** that allow you to see not just the current year's donations on the main window, but also additional years. However, donations from other years are never editable by clicking into their fields and typing. All of their fields have grey backgrounds to indicate this, and they don't allow changes. To edit them, you need to first change to the year of the donation(s) you want to edit, with the **Maintenance** ⇒ **Change Year** [menu option](#).

### Editing Receipted Donations

Donations which have already been receipted (with a value in the Recpt # field) are not editable by clicking into their fields and typing. All of their fields have grey backgrounds to indicate this, and they don't allow changes.

The reason for this is that if you edit an already receipted donation in any way, you will have to create a corrected receipt for it.

One way to change a receipted donation is to delete it and re-enter it with the desired corrections, but that should seldom be necessary, because of the new **Correct** option, described below.

Starting in version 4.01 of DONATION, you can actually correct receipted donations, and then automatically create the corrected receipt. To do that, first click on any field in the receipted donation row that you want to correct, so that the hand pointer at the left points at it. Then click the **Correct** button in the row of buttons above the donations. Alternatively, you can right-click on a field in the receipted donation, and pick **Correct** from the popup menu.

After a question confirming that you want to edit that row, a window such as the following will come up for editing it:

Date	Total Amount	Category	Cheque # / Paid By	Recpt #	Description	Eligible Amt	Descr. of Advantage
12/24/2016	\$21.00	Garden	Cash	7			

The same fields will be displayed in this window as are displayed on the program's main window, based on your selections in the [Donations](#) tab of **Maintenance** ⇒ **Main Window Options**.

Make any changes you need, then click **Save** (which will be enabled as soon as you make any changes). You will then be prompted to create the corrected receipt, after answering whether that receipt number has previously been sent to the donor. (That will determine whether or not the generated receipt is marked "Corrected".)

As usual, you can then print that receipt, email it, or save it to PDF, to get it to the donor. If you do not do any of those actions, but rather just close the window displaying the receipt, the change to the donation will be saved, but any corrected receipt will not be saved, and you will have to create it later.

**Limitations:** For technical reasons, you cannot use the **Correct** button and the editing window above to change a receipted [Gift in Kind](#) donation to a non-Gift in Kind donation, or a [donation with Advantage](#) (with the Eligible Amount filled in) to one without Advantage, or vice versa for either type.

Also, for any receipt generated in a version of DONATION prior to 4.01 (released in November 2017), using **Correct** to add a description of the advantage to a donation with advantage will not change the corrected receipt to be the new type that prints the description of the Advantage. The only way you could do that would be to delete the donation, issue a corrected receipt for it, then re-enter a new donation and issue a new receipt for it.

For more details, see [Generating Duplicate or Corrected Receipts](#).

### **Editing Abundant Donations**

If you are using and importing [Abundant](#) online donations, the basic fields of the donation cannot be edited, or your data in DONATION will no longer match the data from Abundant, and your Abundant [bank deposits](#) won't work. The fields that you cannot edit, and thus have grey backgrounds, are the Date, Amount (or Total Amount), Cheque # / Paid By, and Abundant Batch #. (You can only edit the Abundant Batch # field if you check an option for that on the [Donations](#) tab of **Maintenance** ⇒ **Main Window Options**.)

The most likely type of changes that might be needed to Abundant online donations are changing their Category, if the donor informs you that they picked the wrong one when making their donation, or perhaps changing the Description. That is allowed.

If an Abundant donation has been assigned to the wrong donor, you may need to delete the donation from the original donor - after carefully noting its batch number - then re-enter it for the new donor, and be sure to enter the same batch number for it when you do so.

Also, if Abundant donations were assigned to the wrong donors, that almost certainly means that the two customer IDs imported from Abundant were associated with the wrong donor. Use the **IDs** button at the right of the various main-window buttons for the donor, to show the [Customer IDs](#) window. Copy out the Abundant Account ID and Abundant Customer ID (carefully noting which is which) then delete those rows from that window with the **Delete** button, and close the window. Go to the donor that those customer IDs should have been associated with, click **IDs**, and use the **New** button to add those two IDs back in for that correct donor.

## 11.6 Deleting a Donation

Sometimes you might need to delete a donation, for instance if you had entered it in error, or for the wrong person, or maybe where the cheque bounced.

To delete a donation, first [find the donor](#). Once you have found it, click into any of its fields (say the Amount). Then click the **Delete** button above the Donations area (to the right of the text "Donations for *Name*" - shown in yellow in the image below). Alternatively, you can right-click on a field in the desired donation, and pick **Delete** from the popup menu.

A question will then come up confirming that you want to delete that donation from the list.

Date	Total Amount	Category	Check # / Paid By	Recpt #	Description
12/31/2010	\$50.00	General			

Note: It does **not** work to just delete the contents of the Amount field, or change them to zero, and try to **Save** that change - the program won't let you save a donation row with no Amount. If you have tried this and gotten an error message about it, just click **Cancel** to cancel the change, then delete the row as indicated in the previous paragraphs.

It also does not work to click into the partly blank row at the top of the list of donations, which is the row used for entering a new donation, and try to "find" donations by changing the date, or entering an amount, etc. That does not "find" anything - that row can only be used to enter new donations. As soon as you change anything in that row, the **Save** and **Cancel** buttons become active, to either save that as a new donation, or cancel adding it as a new donation. No deleting of past donations is possible by using this row!

### **Deleting Prior Year Donations**

There are options on the [Donations](#) tab of **Maintenance** ⇒ **Main Window Options** that allow you to see not just the current year's donations on the main window, but also additional years. However, donations from other years cannot be deleted in the current working year. To delete them, you need to first change to the year of the donation(s) you want to delete, with the **Maintenance** ⇒ **Change Year** [menu option](#).

### **Deleting Receipted Donations**

You are allowed to delete donations that have already been receipted (they have a value in the Recpt # field). Of course this should be done only in very unusual circumstances, for instance if you issued a receipt without waiting to see if a cheque was NSF, and then it came back NSF, and you could not get the donor to re-issue a good cheque.

(Mere corrections needed in a receipted donation probably do not require you to delete the donation and re-enter it - that can now be done with the **Correct** button.)

When you click into a field in the row for a receipted donation, the field will not be highlighted, and the cursor will not go into the field. However, the pointing hand at the left will change to point to that row, showing that it is selected and can now be deleted with the **Delete** button.

There will be a 2nd confirmation question asked before you are allowed to confirm the deletion of a receipted donation.

After deleting a receipted donation, and possibly re-entering it corrected (if you deleted it so you could correct it) you need to create a corrected receipt and send it to the donor. Please see [Generating Duplicate or Corrected Receipts](#) for the instructions to do that.

## **11.7 Changing the Date of Donations**

With the **Database** ⇒ **Change Date of Donations** menu option, you can change all donations on one specified date in your current working year to have a different specified date. (Of course, you can always change the date of individual donations, as long as they have not yet been receipted, on the program's main window.)

Most commonly this action would be needed if you had used the **File** ⇒ **One Date Batch Entry** [menu option](#) to enter a batch of donations with one date, and then you realized that you entered them all with the wrong date.

Selecting **Database** ⇒ **Change Date of Donations** brings up a small window on which you specify the From date (the one that the donations are currently listed with) and the To date (the one you want to change them to).

The From date that you enter has to be within the current working year, which is a calendar year unless you are in a country like the United Kingdom, Australia or New Zealand and you are [Using Fiscal Data Entry and Receipting](#), and you are working on a fiscal year.

The To date can be in the same or a different working year.

Click **OK** to make the change. The program will then ask you to confirm that you want to do this action. After you confirm, it makes the requested change in the dates, and tells you how many donations were affected.

**Note:** It is possible that some of the donations whose dates you are changing have already been included in receipts. If this is the case, the program will also prompt you about whether or not to change the status of those receipts to **CORRECTED RECEIPT**, so that you can re-send the receipts to the donors, with the corrected date shown. However, if the To date is in a different working year, moving receipted donations is not allowed.

## 11.8 Handling Gifts In Kind

Gifts In Kind are when a donor gives you goods or services instead of cash (or cash equivalents, like cheques or credit card donations). For instance, they might give you a large quantity of food for a food bank, or donate their services as a professional gardener to your garden. (**However**, at least in Canada, you cannot give receipts for donated services, only for donated goods.)

Handling Gifts In Kind is can be a very complicated issue in many jurisdictions. Please be sure you understand the rules of your appropriate authorities, for example the Canada Revenue Agency (CRA) in Canada, or the IRS in the U.S.A., concerning them, before you decide how to handle them.

### Canadian Receipts for Gifts in Kind

There are **two main points** to understand for Canadian charities who accept gifts in kind (which are further explained in the text below):

1. The donations must be entered with exactly "Gift in Kind" in the Cheque # / Paid By field, and must have a description of the gift in the Description field.
2. They are receipted separately, using the menu options on the **Receipt ⇒ Gift in Kind Receipts** sub-menu.

Many charities in Canada prefer not to accept Gifts in Kind (called "non-cash gifts" by the CRA) directly, for several reasons. Carefully documented valuation is required, especially for larger gifts, and some charities seem to feel that accepting Gifts In Kind is very likely to get you audited by the CRA. Instead, they recommend doing an exchange of cheques rather than accepting the Gift In Kind per se. You merely pay the donor for their goods or services, then they can issue you another cheque for that same amount, as a pure donation. It is that latter donation for which they will receive a receipt. Even in this case, where you pay them for the gift, our understanding is that you must be paying a fair market value.

The Amount entered for a Gift in Kind must be its fair market value. You cannot issue receipts for services received from a donor.

To be considered a Gift in Kind, a donation must have exactly "Gift in Kind" as its Cheque # / Paid By value. Also, you must enter something into the Description field for the donation, describing what was donated. (If the Description field is not displayed in your donation details area, you can set it to be displayed via an option on the [Donations](#) tab of the **Maintenance ⇒ Main Window Options** window.)

The Canada Revenue Agency requires that for all Gifts in Kind (which it calls "non-cash gifts"), the following fields must be added to the charitable receipt you issue:



- Description of Property
- Date of Donation (this is unlike regular receipts, where the year of donation is sufficient)
- Name and Address of Appraiser, if the item of significant value, and was appraised to determine the correct value.

If you do receive large enough donations that you need to have them appraised, you can enter the appraiser's name and address into the program. To do so, first go to the Donations tab of the **Maintenance** ⇒ **Main Window Options** [window](#), and check the checkbox for "Drop-down arrow on the Description Field, for editing the Appraiser". Then, when editing the donation on the main window, be sure to set the Cheque # / Paid By field to "Gift in Kind", enter the Description, and then click the drop-down arrow on the Description field. A menu option pops up, and clicking on that causes a new window to pop up, allowing you to enter the appraiser information.

**Important: For Canadian users, you will always have to do two runs of receipts, whether you are creating them for a single donor or all donors, if you have recorded both regular donations and gifts in kind.** The **Gift in Kind Receipts** sub-menu appears as the last option on the **Receipt** menu, for Canadian users. The regular **Receipt** menu options only receipt for donations whose Cheque # / Paid By value is not "Gift in Kind", and the **Receipt** ⇒ **Gift in Kind Receipts** sub-menu options are used to create receipts for donations whose Cheque # / Paid By value is "Gift in Kind". Both must be used to generate all of your receipts!

One significant difference between the special Gift in Kind receipts and regular receipts is that when you create a regular receipt, it includes all donations from a given donor that are receiptable and have not yet been receipted. (Of course, that is excluding any Gift in Kind donations, if the above-mentioned option was selected.) When you create the special Gift in Kind receipts, each donation goes onto its own receipt, since the description of the donated item has to be included on the receipt. So if there are multiple Gift in Kind donations entered for a given donor, each one will get its own receipt and receipt number.

### **Canadian Gifts in Kind with Advantage**

It is possible for a Gift in Kind to also have an Advantage - goods or services provided to the donor when they give the gift. A possible example would be if a donor donated a painting with a fair market value of \$5,000, and the recipient charity paid them \$1,000 for it. The \$1,000 would be the Advantage, and \$4,000 would have to be entered as the Eligible Amount for the donation. In addition, the Advantage Description field would have to be entered for such a donation describing the advantage received by the donor, since the Description field was used to describe the gift in kind itself. See [Donations and Receipts with Advantage](#) for details.

### **U.S. Receipts for Gifts in Kind**

In the U.S.A., you can also do it as an exchange of cheques as is done in Canada. If you do want to accept Gifts In Kind directly, however, we understand that there are two slightly different situations. In one, the donor assigns a value to the gift, and you enter that value into DONATION. In the other, no value is assigned, and you do not want to enter that value into DONATION. In the latter case, you should enter the Amount of \$0 when you enter the donation, and enter "Gift In Kind" in the Cheque No / Paid By field. (To be allowed to enter \$0 for the Amount, you must check the "Allow \$0.00" [checkbox](#) in the Donations tab of **Maintenance** ⇒ **Main Window Options**.) When you enter \$0 for the Amount, you must also



enter a Description, which will describe the goods or services you have received. You can also enter a Description if you do enter a real value for the Amount. You may also want to create one or more donation categories that are reserved for use with Gifts In Kind.

We are quite unclear what the receipts should look like for Gifts In Kind in the U.S.A. Our expectation is that you will need to do them using [mail merge](#), with a custom-designed letter format. You will probably need two different letter formats for the case when you enter a real Amount for the gift, and the case where you enter \$0. (In the latter case, we are told that you want to leave a space for the donor to enter the amount.)

Since mail merge receipts using custom formats are generally done after [generating the built-in receipt](#) from DONATION, you will probably want to make sure that regular cash (or equivalent) donations do not get mixed up in the same receipt number as Gift In Kind donations. To do that, if you have already got one or more unreceipted cash donations from a donor, and then they give you a Gift In Kind, generate the receipt for the cash donation(s) before entering the Gift In Kind donation. (All unreceipted donations from the same donor are always included on the same receipt.) Similarly, if you already have an unreceipted Gift In Kind donation, and then receive a cash donation, generate the receipt for the Gift In Kind before entering the cash donation.

### **Reporting Gifts in Kind Separately**

Some users suggested in our survey on this topic that the Amounts of Gift In Kind donations should not add into the totals of reports on donations. We're sorry, but we did not make that change. It is not entirely clear to us that everyone would want the program to behave this way, and if we did exclude Gifts In Kind from the reports, we would need to provide a 2nd set of reports to only report on Gift In Kind donations. If you do want to generate donation detail reports that exclude (or only include) Gifts In Kind, you should be able to get this effect by using the [Filter](#) button on the reports window, filtering on either the Cheque No / Paid By field or the category description field (if you reserved one or more categories for Gifts In Kind). A sample filter would be for **Reports ⇒ Donation ⇒ All Donations ⇒ Sort By Name**. To view only the Gifts In Kind, enter the following filter:

Column	Operator	Value	And/Or
cheque_no	Equals	Gift In Kind	

To view only the regular donations, enter the following filter:

Column	Operator	Value	And/Or
cheque_no	Is Empty		Or
chequeNo	Not Equal To	Gift In Kind	

(The first row makes sure that donations with nothing in their Cheque No / Paid By field are still included.) For reports that give summaries by category, as long as you have reserved a category for Gifts In Kind, you can just subtract that category's total from the overall total, to get the total exclusive of Gifts In Kind.

One other user came up with a tricky way to separate Gifts In Kind from all other donations. She created a [2nd database](#), using **Database ⇒ Switch Databases**. Then she kept all normal donations in the 1st database, and put all Gifts In Kind in the 2nd database. However, this has some real issues, including needing to duplicate the Donor information, and having to

ensure that you do not end up with duplicated receipt numbers in the two databases. (The latter problem can be handled by setting the "Starting Receipt Number" in the **Maintenance ⇒ Receipt Options** [window](#) for one of the databases, but please read the help topic on that carefully to understand the issues with doing so.)

## 11.9 Handling Anonymous Donations

Sometimes some organizations receive anonymous donations. The most common example is cash in a church's collection plate.

The usual way to handle this is to create a special donor for which you record such donations. You could name that donor "Cash", or "Anonymous", or whatever works for you. Then just record the total of cash / anonymous donations received on

Be sure to mark that donor as non-receiptable, so it won't receive a charitable receipt when you [generate](#) them with **Receipt** menu options. See [Non-Receiptable Donors and Donations](#) to learn how to mark the donor as non-receiptable.

### 11.10 Recurring Donations

DONATION has three different ways in which you can handle recurring donations:

1. The **Database ⇒ Import ⇒ Donations** [menu option](#) allows you to import donations from an Excel or text file, in a specified format, including recurring monthly ones on a given day of the month.
2. The **Database ⇒ Import ⇒ Par Donations** [menu option](#) is used if you are using the United Church of Canada's PAR (Pre-Authorized Remittance) service, to import a text file they can provide to use.
3. You can memorize recurring weekly, bi-weekly (every 2 weeks) or monthly donations, using the facilities described in this Help topic.

A memorized recurring donation is created by clicking into the row for an existing donation, then clicking the **Memorize Recurring** button, or right-clicking and picking that off of the popup menu. After some confirmation, that brings up the window described in detail in section below for editing the recurrence information.

There are some limitations of what donations can be memorized:

- You cannot memorize donations with an Eligible Amount, or Gifts in Kind.
- You cannot memorize \$0 donations or ones with negative Amounts.
- If the Cheque # / Paid By value contains a number, which is presumably a cheque number, the memorized donation will have that changed to "CHEQUE" (or "CHECK" for U.S. users), since obviously subsequent recurrences wouldn't have the same number.

If you already have multiple manually entered or imported occurrences of a recurring donation, you should always memorize the most recent one. The program will look back to see the previous one, and if it is either exactly 7 days earlier, or about a month earlier, that will allow it to guess whether you want the recurrence to be weekly or monthly, and to correctly set the day of the week or day of the month based on the date of the donation you are memorizing.

Further below in this Help topic there are sections on [Editing Recurrence Details](#), and [Inserting Recurring Donations](#).

### **Editing Recurrence Details**

When you click **Memorize Recurring** after clicking into a row for your desired donation to be recurring, a window such as the following will come up.

**Recurring Donation**

**Donor and Donation**

Donor Name:

Amount	Category	Paid By	Description
\$50.00	General	Cheque	

**Recurrence**

Frequency:

On the  day of the month

Start Date:  Ending Date: ☒ Never

☐ After  recurrences

☐ On or Before

Next Recurrence:

After any change, you need to use Calculate First, to get a new Next Recurrence date, then Save.

As you can see, some defaults (or sample values) are filled in for new recurring donations, which you then need to edit to be as you need them to be. We will first describe the options on the window above, then some alternate options that appear when you make a different choice for the **Frequency** (if it is not Monthly as shown above).

The **Donor and Donation Information** section shows the donor this is for, which is not editable, and the memorized donation field values, which are editable. Since as mentioned above cheque numbers are never memorized (because they would not recur!), the field that is normally named Cheque # / Paid By is just named Paid By in this and the other recurring donations windows shown below.

Some categories you select may be too long to fit within the display area for the category on this window. To allow you to see what the full value is, as your mouse hovers over that field, the entire value pops up in a "tooltip", even if it is short enough to see all of it. The same will apply with other windows shown below that show the list of the recurring donations to be inserted, etc.

The **Frequency** can be Monthly, Weekly or Bi-Weekly (every 2 weeks).

If you ever have a donor with semi-monthly donations (such as on the 1st and 15th of each month) you can set that up as two separate monthly recurring donations, one for the 1st, and one for the 15th.

Under the line for the Frequency, when it is **Monthly**, you need to specify the day number in the month for the recurrence, from 1st to 28th or "Last", which will be the last day in any month it occurs.

For Frequency **Weekly** or **Bi-Weekly**, that section changes to look as follows:

**Recurring Donation**

**Donor and Donation**

Donor Name:

Amount	Category	Paid By	Description
<input type="text" value="\$50.00"/>	<input type="text" value="General"/>	<input type="text" value="VISA"/>	<input type="text"/>

**Recurrence**

Frequency:

On a

Start Date:

Ending Date: ☒ Never

☐ After  recurrences

☐ On or Before

Next Recurrence:

After any change, you need to use Calculate First, to get a new Next Recurrence date, then Save.

You need to specify the day of the week on which it occurs.

The **Start Date** is the first date on or after which this window will calculate a next recurrence date. Usually the Start Date will be today, or in the future, but it is allowable to have it be in the past, and then recurrences will start on or after that date, depending on your other choices (after a confirmation that that is what you really want!).

For the **Ending Date**, you have three options: "Never", or after some entered number of recurrences, or on or before a given date. If you specify after a number of occurrences, however, when you later click the **Calculate First** button, it actually calculates the last recurrence date based on all of your other criteria, fills in the actual ending date, and changes the radio button indicating the style of ending date to select the 3rd radio button. That saves the program from continually having to calculate this in the future, every time this donation is used.

Unlike the recurring transactions feature in our ACCOUNTS bookkeeping program, recurring donations specified in this way are always inserted automatically on the appropriate date. (ACCOUNTS has various additional options, that we do not think are likely to be needed for donations, including an option to prompt you for whether or not you want specific recurring transactions to be inserted, for instance for intermittent bills.)

The **Next Recurrence** date is calculated for you automatically, after you set all of the desired settings above it in the window, and then click the **Calculate First** button. That will calculate the first possible recurrence date on or after the specified **Start Date**, and insert it into the **Next Recurrence** date. (You cannot manually edit this field.)

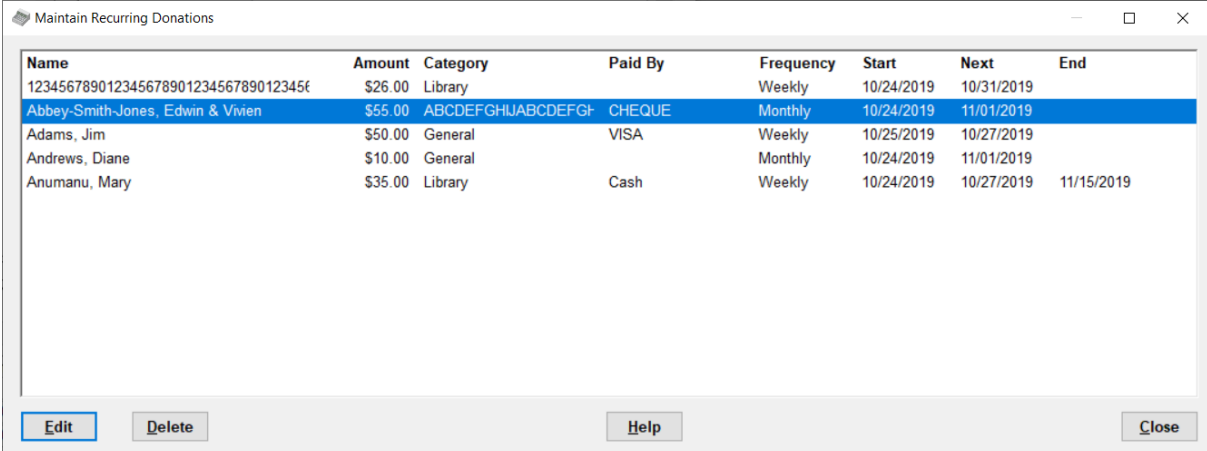
When you are editing recurring donations in this window that had already been set up, the **Calculate First** button is only enabled if you make changes. If you wish to reset the next recurrence date for some reason, come into this window, make any change (and if you don't want that change, change it back), and then click **Calculate First**.

The **Save** button only gets enabled after you do **Calculate First**. It saves the details you have specified, and closes the window. (**Note:** Even if you have set up a recurrence with a Start Date in the past, you will not be prompted to insert occurrences of that donation until the next time you start running the program.)

The **Cancel** button is used to cancel changes and close the window, although that only applies when you are editing an existing memorized recurring donation - new ones must be saved. (A saved memorized donation can later be deleted using the maintenance window described below, if you decide you memorized it in error!) That **Cancel** button will instead say **Close** if you are editing a previously set up recurring donation, and haven't made any changes.

### Maintaining Recurring Donations

You use the **Maintenance ⇒ Recurring Donations** menu option, once you have memorized one or more donations, to bring up a window such as the following (with some sample ones on it that we use for testing):



Name	Amount	Category	Paid By	Frequency	Start	Next	End
123456789012345678901234567890123456	\$26.00	Library		Weekly	10/24/2019	10/31/2019	
Abbey-Smith-Jones, Edwin & Vivien	\$55.00	ABCDEFGHIJABCDEFGHI	CHEQUE	Monthly	10/24/2019	11/01/2019	
Adams, Jim	\$50.00	General	VISA	Weekly	10/25/2019	10/27/2019	
Andrews, Diane	\$10.00	General		Monthly	10/24/2019	11/01/2019	
Anumanu, Mary	\$35.00	Library	Cash	Weekly	10/24/2019	10/27/2019	11/15/2019

This window displays all memorized recurring donations, in alphabetical order by the donor's name.

The first few fields give the donor's Name, and the Amount, Category and Paid By values from the memorized donation. The other fields were explained in more detail in the section above about Editing Recurrence Details.

You can click on any donation in the list, or use the mouse to move to one, and then click one of the buttons at the bottom to do one of the actions described in the following paragraphs.

Click **Edit** (or double-click on a donation) to view or edit an existing recurrence schedule or donation details for an existing memorized recurring donation, as detailed [above](#).

Click **Delete** to entirely delete a memorized recurring donation, so that it no longer recurs. Donations that you have inserted based on this memorized donation will of course still be there!

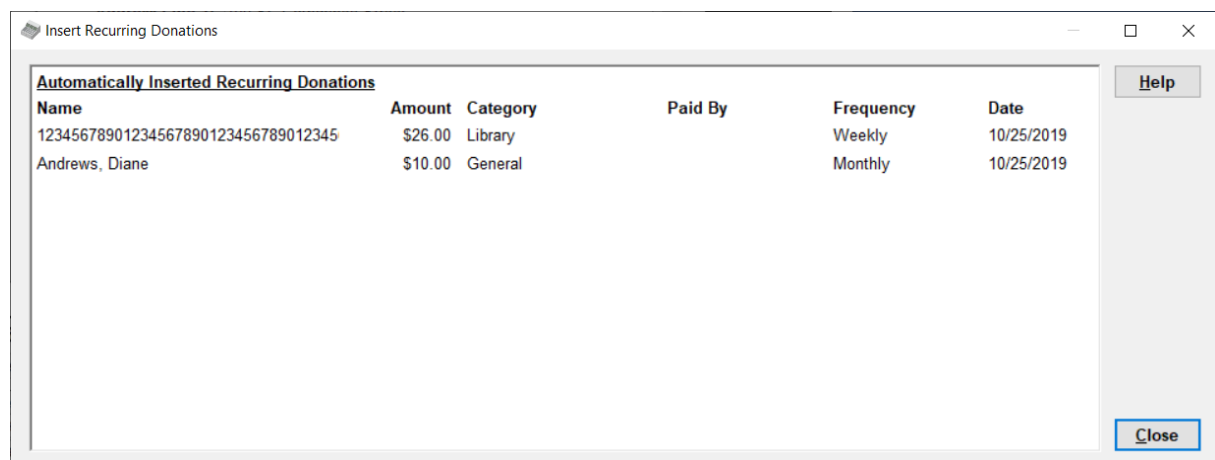
If there is a memorized donation that was memorized for a donor that has been deleted from the current year's data, or not copied forward from a previous year, it will show up with the name "MISSING DONOR!". In most cases you will want to use the **Delete** button to delete such memorized donations, since they can no longer be inserted.

If there is a memorized donation that is no longer recurring, because it has passed its End Date, it will show up in a red font in the window above.

Clicking **Help** displays this Help topic. Clicking **Close** closes this window.

### **Inserting Recurring Donations**

When you have recurring donations that are due to be inserted, because their Next date is today or earlier, then when you start the program, a window like the following will come up:



As in the **Maintenance ⇒ Recurring Donations** list window, the first few fields are the donor's name and donation details. The remaining fields are the recurrence frequency, and the date the donation will be inserted for.

Whichever way you close this window (with the **Close** button, by pressing **Enter** or **ESC**, or by clicking the "X" at the top-right corner of the window) you will then be asked to confirm that you want to save the displayed recurring donations. There is an option to skip doing so if for some reason you think the suggested recurrences are incorrect.

There may be cases where more than one of the same donation needs to be inserted. As an example, if it is a weekly recurrence, and you have not run DONATION for over two weeks, two or more of them will be due. In that case, all of the recurrences up to today's date will be displayed in the window, and saved when you close the window and agree to them being saved..

After this window closes, you should probably review the donations that were inserted. At that point you could also make any changes you want. Examples of changes you might want to make would be to insert an actual cheque number if the donation was made by cheque.

**NOTE:** Because the insertion is automatic, you will have to be very careful to double-check that certain types of donations that get inserted really happened, if something might have stopped the donation from happening. For instance, a recurring donation using a credit card might not happen if that card was discontinued or replaced with a new one! Or the donor might have cancelled a automatic recurring payment they set up, and forgot to tell you.

### 11.11 Using the Popup Calendar to Enter Dates

In the Donation Date field, and in some other date fields, there is a calendar button to the right of the field. Clicking that button brings up a calendar control.

You can use that calendar to enter a date. Alternatively, you can type the date right into the field, then (if you wish) pop up the calendar just to check that it is the date you intended. For instance, if you have entered a date "05/06/2019", you might be unsure whether that was May 6, or June 5. Popping up the calendar would make that clear. Press **ESC** to make the calendar go away.

If you prefer to use the mouse to select dates and navigate in the calendar, just click on a desired date in the calendar and it will be put back into the Date field. The calendar will also close at that point. If you aren't in the right month, click on the arrow images to the left and right of the month and year at the top of the calendar to move to the previous or next month, respectively.

You can also use the keyboard to change the date: **PgUp** moves to the previous month; **PgDn** moves to the next month. The up and down arrow keys move to the previous or next week respectively. The left arrow key moves to the previous day, and the right arrow key moves to the next day. Pressing **Enter** on your desired date selects that date, just like clicking on it.

Press **ESC** to close the calendar without making a selection. You can also close the calendar without making a selection by clicking the same popup button again, or clicking back in the date field, or in most other places on the same window.

**Note:** Most users who are touch typists will actually find that it is faster to just type dates into the Date field, and never use the popup calendar. But many users do like to use a calendar, to be sure they are entering the correct date. There are also many helpful [keyboard shortcuts](#) in the Date field itself.



## 12 ABUNDANT ONLINE DONATIONS

### 12.1 Overview of Abundant Online Donations

DONATION has an option of being quite tightly integrated with the Abundant online donation system, that allows your donors in Canada or the U.S.A. to donate via a web page, via texts from a smart phone (which take you to a web page on your phone) or via a smart phone application called "Abundant Giving", on Android's Play Store and the iOS App Store. (As of March 2022, giving by text is currently only available in the U.S.A.)

If you currently use another vendor for processing online donations, and do not wish to switch to (or add) Abundant, please see [Importing Donors and Donations](#) for information about importing data from other such systems.

Abundant is a product of the church software vendor [ACS Technologies](#) (ACST), with whom we have a partnership for sharing some technology such as this. Behind the scenes, Abundant uses the processing company Vanco to process credit and debit card transactions, and ACH transactions in the U.S.A.

The integration of DONATION with Abundant includes:

- Initial setup of your account, which includes setting up a merchant account for accepting credit cards etc. with Vanco
- Determining the list of donation categories that your donors can donate to through Abundant as a selection of the categories in DONATION
- Importing daily files of Abundant transactions into DONATION
- Exporting bank deposit transaction information based on those Abundant transactions, for importing in the Software4Nonprofits bookkeeping program ACCOUNTS, or QuickBooks, or printing them for manual entry into other bookkeeping programs.

**Note:** The merchant account setup by Vanco for users in Canada currently (as of early 2021) takes 4-6 weeks. Work is underway to reduce that time.

The merchant account setup for users in the U.S.A. generally only takes a few business days.

Abundant is only available to users in Canada and the U.S.A.

#### **Support for Abundant**

Support for your use of Abundant is actually split between [Software4Nonprofits](#) and ACST.

Contact Software4Nonprofits support for any issues that are about processes within the DONATION program, or in the communication between DONATION and Abundant.

Contact ACST for any issues that are about the workings of the Abundant website and not directly involving DONATION. Please be sure to tell them your Abundant Site Number, which you will get from their website, your Organization Name as recorded on their website, and that you are a customer of ours. Here is their contact information:

Phone: (800) 669-2509

Email: [partnersupport@acst.com](mailto:partnersupport@acst.com)

The only exception to these two options (contacting Software4Nonprofits or ACST) is the PCI Compliance issues discussed [below](#), for which you will contact Vanco directly.

### **Pricing and Transaction Fees**

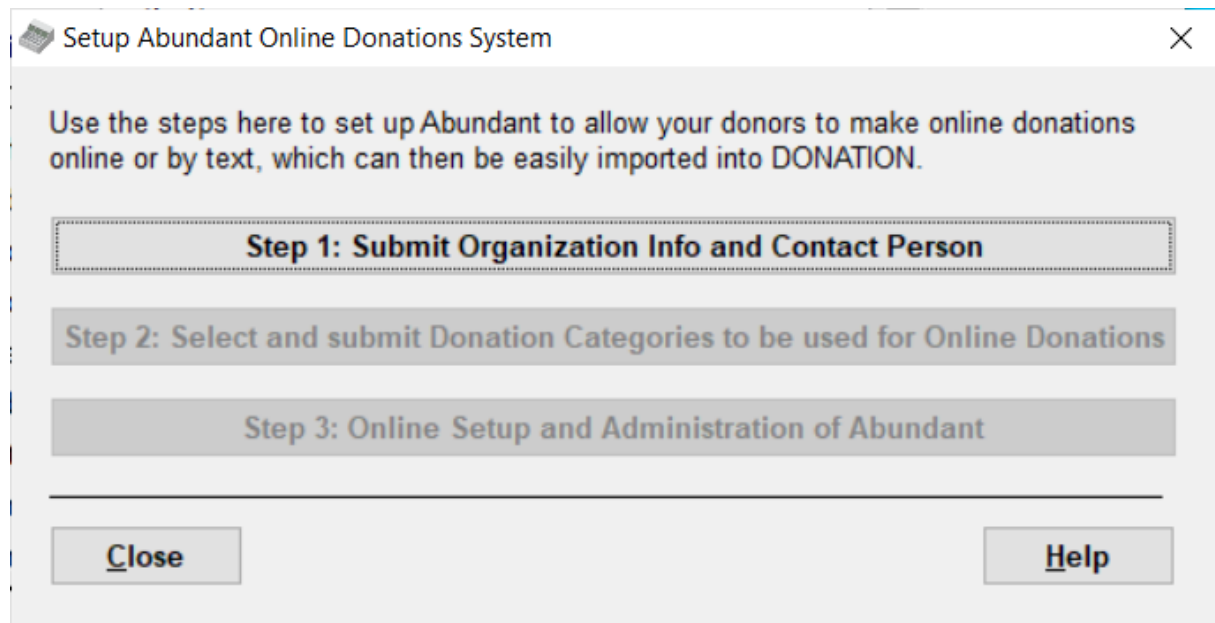
The credit card processing fees that Abundant charges are very competitive, and there is no sign-up fee. There are no monthly fees for users in the U.S.A. - Canadian users pay \$30/month. Software4Nonprofits receives a very small percentage of the processing fees.

You can see the US\$ transaction fees [here](#), the C\$ transaction fees for registered charities [here](#), and the C\$ transaction fees for other organizations [here](#).

Your per-transaction fees are not taken out of each donation you receive via Abundant - you get the entire amount. Instead, the total transaction fees for the month, plus the monthly fee (for Canadian users only) are automatically deducted from the bank account linked to your Vanco merchant account. You will receive a statement from Vanco on the first of each month, showing how much you will be charged for the previous month, and then that amount is deducted from your bank account five business days later.

### **Initial Setup**

Your first step is to use the **Maintenance ⇒ Setup Abundant Online Donations** menu option to bring you to this window:



Clicking the button for **Step 1: Submit Organization Info and Contact Person** brings up the following window:

Organization Information for Abundant

### Organization and Contact Person Information

**Your Organization**

Organization Name: Your Organization

Address Line 1: 100 Main St.

Address Line 2: Suite 100

City: Anytown Prov/State: ON

Postal Code: A1B 2C3 Country: Canada

Phone: 123-456-7890

Website Address:

**Primary Contact Person**

Contact Name First: Dan Cooperstock, Last: Treasurer

Phone:

Email: info@software4nonprofits.com

Position Title:

OK Cancel Help

You will need to review the information here and fill in anything that is missing or incorrect. The greyed-out uneditable fields, as well as many of the editable fields, are taken mostly from **Maintenance** ⇒ **Organization Info** in the program, with the Country taken from your settings in **Maintenance** ⇒ **Receipt Options**. So if those settings do not appear to be correct, you can **Cancel** this window and go back and correct them in those other places. The City, Prov/state and Postal Code fields are extracted from the last Address field in the Organization Info field as well as is possible - you can correct them if they are not correct. Be sure to carefully select the name and Email address of the Primary Contact Person. (We recommend removing any position title, such as "Treasurer" in the screen shot above, from the Name field.)

Once you are satisfied with the contents of the window, click **OK** to submit it to Abundant. Assuming that submission is successful, the button on the first setup window for **Step 2: Select and Submit Donation Categories ...** becomes enabled. When you click it, your normal **Maintenance** ⇒ **Donation Categories** window appears, with one new column added with checkboxes for whether to include them in the categories that Abundant donors can donate to. Here's an example, with some of them checked:

Category	Receiptable?	Abundant?
Allocated Jamaica	✓	<input checked="" type="checkbox"/>
Allocated Trust Fund	✓	<input type="checkbox"/>
Camp NeeKauNis	✓	<input type="checkbox"/>
Canada Helps Fee	✓	<input type="checkbox"/>
Christian Peacemaker	✓	<input checked="" type="checkbox"/>
Garden	✓	<input checked="" type="checkbox"/>
General	✓	<input checked="" type="checkbox"/>
Iraq Fund	✓	<input type="checkbox"/>
Jails - Don	✓	<input type="checkbox"/>
Library	✓	<input type="checkbox"/>
Memorial	✓	<input type="checkbox"/>
Out-of-the-Cold	✓	<input type="checkbox"/>
Refugee Committee	✓	<input type="checkbox"/>
Rooms	✓	<input type="checkbox"/>
TFSR	✓	<input type="checkbox"/>
Trustees, Grants to	✓	<input type="checkbox"/>

Check the Abundant column for each of your categories that you want to be available (which could be all of them, but must be at least one of them), and click **Save**. The Save will both save them in the DONATION database, and transmit them to Abundant.

This is the only way that your list of donation categories in Abundant can be managed - from this window. Once the initial Abundant setup has been done, any use of the **Maintenance** ⇒ **Donation Categories** menu option will include the new Abundant checkbox column, and Saves in this window will always be transmitted to Abundant.

Once you are finished this step, the **Step 3: Online Setup and Administration of Abundant** button will become enabled. Clicking it takes you to the Abundant website to complete your setup, which includes creating a vendor account with the back-end processing company Vanco. That setup usually takes a few days after you submit everything, after which you will be informed that it is completed. (The Vanco setup unfortunately currently takes 4-6 weeks for Canadian users, though work is underway to reduce that.)

In case you already have a merchant account with Vanco, see [below](#) for some special steps for switching to Abundant.

On the Abundant website, you will also find out (and be able to change) the URL (web address) for your donors to go to to donate, and the code to be used for donations by text.

For direct access to further administration web pages on the Abundant website, you can use the **Maintenance** ⇒ **Abundant Configuration Web Pages** sub-menu options **Giving Forms**, **Gifts**, **Batches**, **Scheduled Gifts**, **Accounts**, **Funds**, and **Settings**. Each of those goes to the appropriate setup page for that aspect of your Abundant online donation system. This sub-menu only appears once you have completed Step 2 above.

For some videos on Abundant setup, go to <https://giving.acstechnologies.com/abundant>. Please note, however, that some of those videos are specifically about the integration of Abundant with ACS Technologies' own program ACS, rather than with DONATION. But there is still a lot of helpful, relevant information there.

For Help documentation on the Abundant user interface, setup and administration, go to <https://wiki.acstechnologies.com/display/ACSDOC/Abundant+for+Administrators>. Again, this document has references to ACS Technologies' own program ACS, but much of it is still relevant.

One feature that you will see mentioned in some of those resources is the ability to prompt donors to add a small amount to help cover processing costs. To keep things simpler, that option has not been included for users of DONATION.

For resources about Abundant to add to your website, to hand out to your members or donors about how to donate, etc., go to <https://givingresources.acst.com/abundant-home/>.

### **About your Merchant Account with Vanco and PCI Compliance**

As mentioned above, part of the setup of Abundant includes setting up a merchant account for your organization with Vanco, which does the back-end transaction processing.

When you have a merchant account that accepts credit cards, you're required to comply with PCI Data Security Standards ("PCI DSS"). Within a month of your merchant account going live, Vanco will send you information on how to complete a PCI DSS questionnaire, which asks how your organization is accepting credit cards. You'll be asked to complete this questionnaire every year that you have a merchant account.

The PCI non-compliance monthly fee, which is listed on transaction fee pages linked to [above](#), will only be charged if you fail to complete the questionnaire or do not follow the expected standards.

You will also be required to have an Incident Response Plan.

If you have questions about your PCI responsibilities, including the Incident Response Plan, call Vanco at 1-855-815-4816 or email [pcisupport@pci.vancopayments.com](mailto:pcisupport@pci.vancopayments.com).

### **What if we already have a Vanco Merchant Account?**

If you are an existing Vanco user, you do not have to complete a second merchant account application. Rather, you complete a simplified form, giving Vanco permission to create a merchant account for Abundant. Additionally, you can keep your existing Vanco rates (no need to choose a new plan or switch plans).

Here's are your steps in this case:

### **Sign Up:**

Begin the Abundant setup process in DONATION as explained above. When you reach the Vanco merchant account application step, you need to complete this online form instead: [ACST Existing Client Application](#). After the new merchant account is live, you can complete the setup in Abundant and DONATION, and then begin transitioning contributors to the new solution.

### **Transition Donors:**

You will need to update your website with the Abundant giving URL, and let your donors know that the online giving solution has changed. Even though Vanco can create a second merchant account, ACS Technologies cannot convert the saved payment methods and recurring gift schedules for your donors. If you have donors with scheduled gifts in Vanco's system, you need to notify those donors, asking them to cancel their recurrence in the Vanco solution and set it up in Abundant.

### **Cancel the Non-Integrated Vanco Account:**

Your old merchant account will remain active until you are ready to cancel it with Vanco. Most organizations leave the old merchant account active for 30-60 days, to give donors with scheduled gifts time to set up their new gift in Abundant and stop their existing gift in Vanco's system. Still, Vanco does not limit this; you can leave the old merchant account running for as long as you need.

### **Issues for Users with Multiple Databases**

Some users have multiple databases, for different organizations. See [Switching Databases](#) for details.

You can set multiple databases up independently for Abundant, but you **must** make sure that the mailing address for each one in the **Maintenance** ⇒ **Organization Info** [window](#) is different! If two organizations that get set up for Abundant have the same mailing address, they will be considered to be the same organization, and merged together in Abundant, which will not be what you want.

You **can** use the same email address for different databases you set up for Abundant, if desired. If you do that, then when you log in to the Abundant website, you will be asked which organization's account you want to connect to.

Finally, when you have multiple Abundant accounts, you may need to clear your cache in your web browser before you switch between them, or you are likely to encounter error messages, and/or be logged into the wrong organization's Abundant account.

**See Also:** [Importing Abundant Online Donations](#) and [Abundant Bank Deposits](#)

## **12.2 Importing Abundant Online Donations (2)**

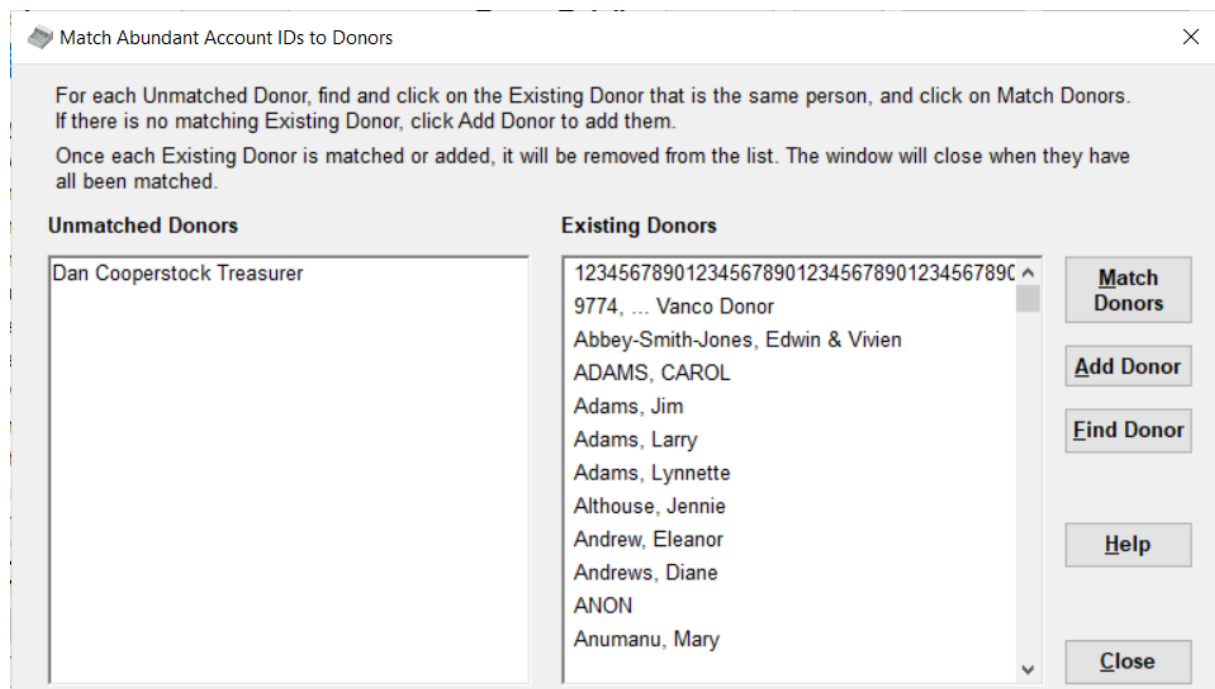
If you haven't already done so, please read [Overview of Abundant Online Donations](#) first, which covers the required setup before your donors can donate via Abundant, after which you can start importing those transactions as described on this page.

## Importing Abundant Transactions

Once the donations start coming in, they will be deposited to your bank in daily batches, and you can import the details of those batches with the **Database ⇒ Import ⇒ Abundant Donations** menu option. Each time you run that, it will import all available daily transaction files, if any, since the last time you used it.

The donors in the transaction files are matched to your donors in DONATION by two ID (identifier) fields that Abundant supplies, which are stored with the donor after the first time they are imported. They are called Abundant Account ID and Abundant Customer ID, and can be seen for a given donor by using the **IDs** button that appears along with the other buttons above the Donor Details, if you have clicked on the **Customer IDs** checkbox in the first tab of the **Maintenance ⇒ Main Window Options** [window](#). (Configuring Abundant actually automatically enables that checkbox and thus the display of the **IDs** button.)

If one or more donors are imported from Abundant that do not already have their IDs stored for matching, a window such as the following will come up before the transactions are displayed, to allow you to match the Abundant donors to the donors in DONATION:



This sample shows only one unmatched donor, but there could be multiple unmatched donors on the left-hand side.

The instructions at the top of the window tell you most of what you need to do. You can also use the **Find Donor** button to find existing donors in your database in the list at the right, using the same [Find Donor](#) window that you can use on the program's main window.

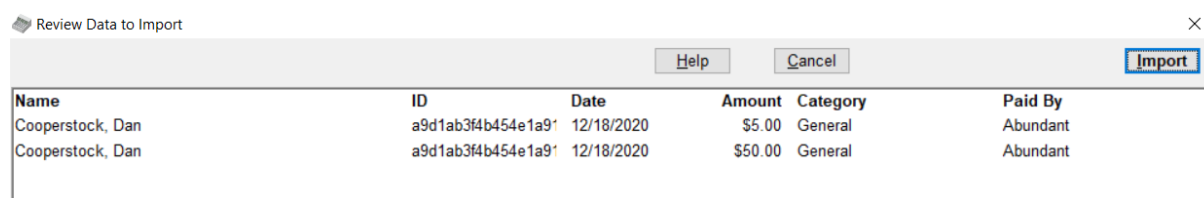
As an additional help to the matching, especially for common names like John Smith, if you hover the mouse over a name in either the left or right panels, any phone number, postal address and email address information that is available will pop up.



The unmatched names from Abundant in the left panel will appear in whatever format they were entered into Abundant. The existing donor names in the right panel are listed as on the program's main window Donor List, showing a Business Name if there is one, and otherwise in the format "Last Name, First Name".

Once you have dealt with all of the Unmatched Donors in the left panel, by either clicking on them on the left, and clicking on the matching donor on the right, and using **Match Donors** to match them, or using **Add Donor** to add a new donor (which pops up a window for reviewing their details and adding them), this matching window will close.

Once you are through with this window, or if this window was not needed because only previously-matched donors had donations in the batches being imported, the following window will pop up to allow you to do the importing:



You will see that the Names shown here are the matched names from the Donor List in the program, not the original names that Abundant provided.

If you are satisfied with what you see, click **Import** to import the donations.

Two types of transactions can come in from Abundant with negative Amount values. Their Paid By values will be either "Abundant Refund" or "Abundant ACH Return". A Refund is something initiated by your Abundant administrator on the website, by a donor's request, to refund a donation. An ACH Return is when an ACH donation (in the U.S.A.) is rejected by the bank. Your bank will also inform you of that, and there will likely be a bank charge.

The negative amount transactions are imported into DONATION so that the totals of [Bank Deposits](#), as described in the next Help page, will be correct.

### **Credit Card Processing Charges**

The processing charges for credit card donations and other forms of payment are **not** subtracted off of each donation when you receive them, unlike with many other online donations systems like PayPal, or CanadaHelps.

Rather, at the end of each month, the processing company Vanco will do a bank withdrawal to cover all of their processing charges, and send you an invoice detailing them. You will want to do an entry in your bookkeeping program to reflect that.

**See Also:** [Abundant Bank Deposits](#)

## **12.3 Abundant Bank Deposits**

If you haven't already done so, please first read [Overview of Abundant Online Donations](#), which covers the required setup before your donors can donate via Abundant, and [Importing Abundant Online Donations](#), which covers importing the donation details into DONATION.

Vanco, the processing company that actually processes the Abundant donations, will deposit your donations in daily batches to the bank account that you configured during the initial setup. Each batch has a Batch Number. Vanco will inform your administrator of each batch that is deposited, with the total dollar amount of that batch.

Those batch numbers are also stored along with the donations that are [imported](#) via **Database ⇒ Import ⇒ Abundant Donations**. After you finish a successful import, you will be prompted to generate the bank deposit accounting transactions. They can either be exported for importing into ACCOUNTS or QuickBooks, or printed for manual entry into any bookkeeping program.

### **Required Setup**

Before you can process Abundant bank deposits, you have to do the same configuration steps that are needed for processing bank deposits of cash and cheques etc. in DONATION. Please see [Configuring Bank Deposits](#) and make sure you have done all of the steps there. It is particularly important that you fill in names for your accounting program accounts for each donation category that you have set up to be used for Abundant donations.

### **Confirming, Reporting and Exporting Bank Deposits**

To work with the bank deposits based on the Abundant transactions you have imported, use the **Maintenance ⇒ Create Bank Deposit ⇒ Abundant Donations** menu option. Technically you aren't "creating" a bank deposit - Vanco already did the bank deposit. Rather, you are confirming their amounts, and then reporting on them and/or exporting them for importing into ACCOUNTS or QuickBooks. (If you use a different accounting program, the transaction to manually enter is in the report.)

When you use that menu option, a window such as the following will come up:

Specify Abundant Bank Deposit for Software4Nonprofits ACCOUNTS

Starting Batch Number: 0

Deposit to Bank Account: TD Acct #: 12345

Retrieve Batches

Date	Batch Number	Total	Correct?
------	--------------	-------	----------

Save Report Export Help Close

If you have used this window before, the Starting Batch Number will show up as one higher than the last batch number that was imported via **Database** ⇒ **Import** ⇒ **Abundant Donations** and also successfully processed in this window. You can change that number if you need to re-process any prior batches of transactions again, for instance to re-export them for your accounting program.

The **Deposit to Bank Account** and **Acct #** fields are exactly as in the regular [Bank Deposits](#) window for cash and cheques etc. Those fields will be filled in with your last-used values, and have appropriate drop-down lists of recently used values. If you are using ACCOUNTS as your bookkeeping program, and it is installed on the same computer you are running DONATION on, what is in the **Deposit to Bank Account** drop-down list changes. If possible, the **Deposit to Bank Account** field will instead be changed to a drop-down list of the usable Bank accounts from ACCOUNTS.

Click **Retrieve Batches** to retrieve a list of the Abundant batch numbers that are greater than or equal to the entered starting Batch Number. That will normally bring up data as in the following window. (The sample below just shows our own testing data):

Specify Abundant Bank Deposit for Software4Nonprofits ACCOUNTS

Starting Batch Number:

Deposit to Bank Account:  Acct #:

**Retrieve Batches**

Date	Batch Number	Total	Correct?
12/04/2020	147860735	\$30.00	<input type="checkbox"/>
12/09/2020	15421345	\$12.50	<input type="checkbox"/>
12/18/2020	14345246	\$55.00	<input type="checkbox"/>
12/30/2020	167860735	\$5.00	<input type="checkbox"/>
12/30/2020	167860736	\$5.00	<input type="checkbox"/>

Batch totals may occasionally be a negative dollar amount. That would be because they included either refunds or ACH Returns (in the U.S.A.), which get imported as negative dollar donations, to make sure everything balances!

Note: in this sample test data some of the batch numbers are different lengths and the numbers are not in order - that will not happen in your real data.

You will also notice that in the example above, there are two batches for the same date (12/30/2020). For users in the U.S.A., if your Abundant setup allows for ACH donations, the credit and debit card donations completed on a given date will be in one batch, and the ACH donations completed on that date will be in another batch, with a different number.

Your next step is to compare the totals for each batch to the information that was sent to you by Vanco. The totals should all be correct. Assuming they are, check the Correct checkbox for each one that is correct, and then click **Save**, which will have become enabled (clickable) as soon as you check any of the checkboxes.

You do not have to mark all of them correct at the same time, if for any reason you are only sure about, or only ready to work on, the earlier ones on the list.

Doing the Save will create a record of a bank deposit in DONATION for each batch that you marked as correct, and mark each donation within those batches as being part of that bank deposit.

After the Save, the **Save** button will be disabled again, and the **Report** and **Export** buttons will be enabled.

Clicking **Report** will print exactly the same sort of bank deposit report that is printed when you create regular bank deposits for cash and cheques etc., with one page of the report for each batch / bank deposit. The only difference is that each page has its batch number in the header. Each page has four sections. The first section shows the details of the donations included in the bank deposit. The second shows the totals by donation category. The third (to the right of the second) shows the totals by Paid By, such as "Abundant Transaction". The fourth shows the summary transaction that will be exported to your accounting program, if you use the **Export** button, or that can be easily manually entered into any accounting program other than ACCOUNTS or QuickBooks Desktop. You will probably want to print and save that report.

#### Retrieving Already Saved Batches

If you enter a Starting Batch Number that has already been processed in a previous use of this window, and click Retrieve, all batches with numbers greater than or equal to that Starting number will still be retrieved. The ones that have already been saved will appear with their Correct checkbox already checked, and an **Undo** button to the right of them.

If for some reason a batch was incorrectly marked as Correct and saved, you can click **Undo** to allow you to correct that. Clicking **Undo** will:

1. Delete the bank deposit record from the DONATION database, and
2. Remove the hidden information that marked the donations that were part of that batch as being part of that bank deposit.

It will then be as if that batch had never been marked Correct and saved in this window. That will allow you to re-do that work if necessary.

#### Exporting your Transaction(s) to a File

Next, as long as you are using either Software4Nonprofits ACCOUNTS or Intuit QuickBooks Desktop, you can use the **Export** button to export a file that can be imported into the appropriate program, which will insert one summary transaction for each bank deposit. Those transactions will exactly match the fourth parts of the report mentioned above.

If you have configured that you are using the ACCOUNTS program, and the ACCOUNTS program is installed on the same computer on which you are running DONATION, the export file will be put into the Import subdirectory of the ACCOUNTS program's data directory. (The ACCOUNTS data directory is like DONATION's [data directory](#), but ending in "Cooperstock Software\Accounts" instead of "Cooperstock Software\Donation".) Also, in this case, after the export has completed, you will be given an option to run ACCOUNTS and have it automatically prompt to import the file.

If you have configured that you are using QuickBooks Desktop, or you have configured that you are using ACCOUNTS but ACCOUNTS is not installed on your computer, the export file will be put into the Export subdirectory of DONATION's [data directory](#).

The exported file name will be BankDeposits-YYYY-MM-DD.DB.IIF if you are exporting for QuickBooks Desktop, or BankDeposits-YYYY-MM-DD.DB.S4AIF if you are exporting for ACCOUNTS, where YYYY-MM-DD is today's date. (The ".DB" part will change appropriately if

this is for an additional database created with the **Database** ⇒ **Switch Databases** [menu option](#).)

In either case, you will also be given an option to email the exported file (as an attachment) to someone else. This is for the common situation where there is a separation of duties, with one person handling the donations, and another person handling the accounting.

Please see either [Importing Bank Deposits into ACCOUNTS](#) or [Importing Bank Deposits into QuickBooks](#) to learn how to import the transactions into those programs, and to understand any relevant issues.

For accounting programs other than ACCOUNTS or QuickBooks Desktop, you can just use the details in the fourth part of the details report printed out above with the **Report** button to enter the bank deposit transaction manually into that program.

In the very unlikely case where you process multiple sets of Abundant bank deposits on the same date, their export file names will be the same, so if your accounting program is on the same computer, be careful to import the first one into your accounting program before you create the 2nd one in DONATION. Otherwise, the 2nd export file will overwrite the 1st export file! (If this does happen, you can get back to the 1st one again by re-retrieving the 1st bank deposit again in this window, as explained below under [Correcting Errors in Bank Deposits](#), then using the **Export** button again.

**Close** this window when you are done.

**Note:** Unlike QuickBooks Desktop, QuickBooks Online does not have a facility for importing the sort of export files exported by DONATION, IIF files. So as with any other bookkeeping or accounting program other than DONATION or QuickBooks Desktop, you can just manually enter the printed-out summary transaction for Bank Deposits into QuickBooks Online. There are apparently also 3rd-party programs that allow for the importing of IIF files into QuickBooks Online, but doing that would not be supported by us, because it is not our product!

### Correcting Errors in Abundant Bank Deposits

Normally the Total for a batch shown on this window will always equal the total for that batch sent to you by Vanco. It should be an extremely rare for that to not be the case.

DONATION actually stops you from editing the Date, Total Amount, Cheque # / Paid By and Abundant Batch # (if it is displayed) for imported Abundant donations, which should prevent almost all potential problems that could cause the totals not to match in this Bank Deposits window. (You can still edit the Category, Description, and if they are displayed, Eligible Amount and Description of Advantage.)

So the most likely reason for the totals not matching would be if you had deleted an Abundant donation. And the only good reason for doing that would be if it was recorded for the wrong donor. If you realize that that is the case, first, turn on the display of the Abundant Batch # field with the option for that on the [Donations](#) tab of **Maintenance** ⇒ **Main Window Options**.

Then you can delete the donation from the original donor - after carefully noting its batch number - and then re-enter it for the new donor, being sure to enter the same batch number for it when you do so.

Also, if Abundant donations were assigned to the wrong donors, that almost certainly means that the two customer IDs imported from Abundant were associated with the wrong donor. Use the **IDs** button at the right of the various main-window buttons for the donor, to show the [Customer IDs](#) window. Copy out the Abundant Account ID and Abundant Customer ID (carefully noting which is which) then delete those rows from that window with the Delete button, and close the window. Go to the donor that those customer IDs should have been associated with, click **IDs**, and use the **New** button to add those two IDs back in for that correct donor.

If you use the Abundant administrator website to cancel or refund a donation, either it won't appear in your downloads at all (likely if the cancellation is the same day as the donation) or a separate refund transaction will appear in a later day's batch. So please do not delete any donations from DONATION that have been refunded in Abundant - the imports of subsequent batches will import a negative dollar refund transaction to cancel them. Deleting the donations in DONATION would cause your batch totals to be incorrect!



## 13 EDITING CATEGORIES

### 13.1 Editing Categories

There are two types of categories in DONATION:

1. Donation Categories, for categorizing individual donations (for example as to the fund the donation is for, like General or Building). Every donation must be assigned a category.
2. Donor Categories, which are two independent lists you may optionally set up to categories your donors. For instance, for a church with a concept of membership, one list might categorize them as Members, Attenders, or Members Elsewhere. The other list could be used for a completely different categorization of the donors, if desired. You are not required to use Donor Categories.

See the following topics for further details:

[Donation Categories](#)  
[Donor Categories](#)

### 13.2 Donation Categories

A donation category is entered as part of each donation.

You maintain the list of available categories by selecting **Maintenance** ⇒ **Donation Categories** from the main menu. You can also get to it by selecting the "<Add New>" entry on the Category drop-down list in either the main window or the One Date Batch Entry [window](#) (in which case you will immediately have the cursor put into a new empty row, where you can enter a new category's name).

The categories entered on this window are displayed in a drop-down list when you enter donations, in alphabetical order.

There should usually be a donation category called "General", which is the only one that comes by default in a new installation of DONATION. You can add as many other categories as you wish to use. If there is a category "General", it will be the default category for new donations. However, you can change which category is the default for new donations, with an option on the Donation tab of the **Maintenance** ⇒ **Main Window Options** [window](#). If you feel a need to change the "General" category to a slightly different name, but still want it to be the default category, be sure to set it to be the default on that window.

On the Donation Categories window you can click the **New** button or press **Enter** to add a new category. To edit the name of an existing category, just click into the name and make your changes, then press **Enter** or click the **Save** button to save your changes. Click the **Cancel** button or press **ESC** to undo an edit, or to not save a category entered with the **New** button.

You can click **Delete** to delete an unused category that you have selected by clicking on it. It will not let you delete a category that is being used by one or more donations. (If you decided

that you should not have used that category, you could find those donations, change their category to some other category, and then delete the category.)

If you try to change the name of a category that already has donations using it, you are prompted to make sure that is what you want to do. Changing the name will change the category on all donations that currently use that category.

Click **Close** or press **ESC** when you are done editing donation categories.

#### Non-Receiptable Donation Categories

You will notice that beside each Category name on this window, there is a display-only field "Receiptable", to show whether that category is Receiptable or Non-Receiptable. It shows a check mark for Receiptable, or an "X" for Non-Receiptable. This is based on the categories being Non-Receiptable if they contain exactly "Non-Receiptable", or start with "NR " ("NR", plus a space), or end with " NR" (a space, plus "NR"). Examples of the latter would be "General NR" or "NR General". "NR" is an abbreviation for "Non-Receiptable".

Any donation whose category is considered to be Non-Receiptable will never be included in any official receipt created with the Receipt menu options.

For details on the other ways to mark a donor or donation as Non-Receiptable, please see [Non-Receiptable Donors and Donations](#).

#### Categories and Bank Deposits

If you have configured bank deposits in DONATION with the **Maintenance** ⇒ **Configure Bank Deposits** [menu option](#), part of that configuration is to associate accounts in your accounting program with donation categories. As a result, if you make changes in this Donation Categories window, you may have to make some corresponding changes in those associations.

To make that happen, you will be prompted when closing this Donation Categories window, if you have configured bank deposits, to open the window for [associating accounts with categories](#). It is strongly recommended that you answer Yes to do so, and review whether any changes are needed.

## 13.3 Importing New Categories

Several menu options under **Database** ⇒ **Import** allow you to import donation information, and do not require the donation category names in the data being imported to match existing [donation categories](#) that you have already set up in the program. Instead, they allow you to specify conversions of imported category names to existing category names, or to create new categories using the imported names (or variations of them).

Cases where this would be necessary include if the imported category names are more than 20 characters long (the maximum length of donation categories in the program), or if there are just different variations of the same category name from various sources. An example would be if you have an existing donation category "Library", but an import source calls it "Library Donations".

When this is the case, and those specific new category names have not been handled by previous imports, a window such as the following will be displayed. It allows you to associate the new ones with existing categories, or create your desired shorter forms (maximum 20 characters) for new categories.

Imported Category Name	New Category Name	Existing Category
Library Donations	Library Donations	<Add New>
Refugees Committee	Refugees Committee	<Add New>

For each displayed row, the Imported Category Name is what was found in the import file, the New Category Name is the same (or the same cut down to at most 20 characters), and the Existing Category starts out as **<Add New>**.

You can leave **<Add New>** alone, and edit the New Category Name to be the way you want it.

Or, if you think the imported name for one that starts out with **<Add New>** is really just another name for an existing category in your database (perhaps "Library" for the first row in the sample above), you can pull down the Existing Category drop-down and pick the existing category to match it to. Then all categories in the import file with the displayed Imported Category Name will instead be set to have the existing category.

Click **OK** to save any changes you have made, or to accept what is displayed even if you have not made any changes. The import that you are working on will then proceed.

If you feel you have made any mistakes in your associations of imported category names to new or existing categories in the program, you can later come back and fix those associations with the **Maintenance ⇒ Imported Category Conversions** [menu option](#).

## 13.4 Imported Category Conversions

Several menu options under **Database ⇒ Import** allow you to import donation information, and do not require the donation category names in the data being imported to match existing [donation categories](#) that you have already set up in the program. Instead, they allow you to specify conversions of imported category names to existing category names, or to create new categories using the imported names (or variations of them).

Cases where this would be necessary include if the imported category names are more than 20 characters long (the maximum length of donation categories in the program), or if there are just different variations of the same category name from various sources. An example would be if you have an existing donation category "Library", but an import source calls it "Library Donations".

Having made such associations in the course of doing those imports, you may want to make some changes to them, including to delete conversions that you don't think will be needed in the future. You can do that with the **Maintenance ⇒ Imported Category Conversions** menu option. Selecting that will bring up a window such as the following, assuming any such conversions have actually already been made:

Imported Category Name	New Category Name	Existing Category	
<b>Previously Matched Category</b>			
General New	General	General	Delete
General/Operating	General	General	Delete
Library New	Library	Library	Delete
Refugee Committee New	Refugee Committee	Refugee Committee	Delete

The instructions at the top of the window should be fairly self-explanatory. For all existing conversions, the New Category Name will be same as what is in the Existing Category field, which is a drop-down list of your existing donation categories.

If you have associated an Imported Category Name (the value in the first column of the window) to the wrong existing category, just select the correct value in the Existing Category drop-down list before you click **OK** to save your changes. (Selecting a new value from the Existing Category drop-down will immediately change the New Category Name to match it.)

If you have an Imported Category Name that has been associated with an Existing Category, but in fact it does not correctly match to **any** existing category in the program, you should instead select the value "<Add New>" from the Existing Category drop-down list. When you do that, the New Category Name field becomes editable, and you can change it to whatever you want it to actually be saved as in your list of donation categories. (It will initially be changed to the Imported Category Name, or its first 20 characters if it is longer than that.) Then when you click **OK**, that new category will be added to your list, using the entered New Category Name.

The final thing you can do in this window is to click the **Delete** button on any row, to delete that row's conversion. If you do that and in the future you again encounter an imported category

name with the Imported Category Name that you deleted, you will again be prompted as to what you want to do with it, during that import process.

As always you can click **Cancel** in this window to abandon any changes you have made, and **Help** to see this Help topic.

## 13.5 Donor Categories

Donor Categories are two independent lists options that you can use to categorize your donors, if you wish. They are entered into the Category 1 and Category 2 fields that are part of the Donor Details, by selecting a value from a drop-down list.

You do not have to use these donor categories at all (unlike [donation categories](#), which must be used). The lists of them are maintained just like donation categories are maintained, via the menu options **Maintenance** ⇒ **Donor Category 1** and **Maintenance** ⇒ **Donor Category 2**. You must use those menu options before you can enter the Category 1 and 2 values, or there will be no available values to select in the drop-down lists!

Note: You can also get to those maintenance windows by selecting the "<Add New>" entry on the Category 1 or Category 2 drop-down list in the Donor Details area of the main window (in which case you will immediately have the cursor put into a new empty row, where you can enter a new donor category's name).

As an example of their use, one set of categories might be used to track members vs. attenders of a church, while the other set of categories might be used to track high, medium or low donors.

You can actually change the names of these two fields from Category 1 and Category 2 to whatever you want, to represent what they are each lists of, by changing the Category 1 Label and Category 2 Label fields in the Donor tab of the **Maintenance** ⇒ **Main Window Options** [window](#). If you do that, all related prompts, menu options etc. will change accordingly. For instance, if you set Category 1 Label to "Membership Status", the menu option **Maintenance** ⇒ **Donor Category 1** will instead read **Donor Membership Status (Category 1)**.

You would probably not want to use Donor Categories to track characteristics of your donors in cases where they can have more than one value from the same list, because you can only pick one Category from each of the two Donor Category lists for each donor. For instance, suppose a church had multiple committees that some of its donors sit on, and some donors sit on more than one committee. Then using Donor Category 1 to record which committee a donor sits on would not really work, because you could only record the first committee. Instead, see [Groups and Committees](#) for a good way to track multiple-choice options.

On the Donor Categories window you can click the **New** button or press **Enter** to add a new category. To edit the name of an existing category, just click into the name and make your changes, then press **Enter** or click the **Save** button to save your changes. Click the **Cancel** button or press **ESC** to undo an edit, or to not save a category entered with the **New** button.

You can click **Delete** to delete an unused category that you have selected by clicking on it. It will not let you delete a category that is being used by one or more donors. (If you decided that you should not have used that category, you could find those donors, change their category to some other category, and then delete the category.)

If you try to change the name of a category that already has donors using it, you are prompted to make sure that is what you want to do. Changing the name will change the category on all donors that currently use that category.

Click **Close** or press **ESC** when you are done editing donor categories.

#### Non-Receiptable Donor Categories

Some donors on your list may not be supposed to ever receive an official receipt generated by the **Receipt** menu options. One example would be if you have a donor such as "Cash", in which you enter all anonymous cash donations. At least in Canada, you should also never issue official charitable receipts to other charities, if they donate to you.

You can mark donors as Non-Receiptable, so that they never receive a receipt, by creating special values in either (or both!) of the Donor Category 1 or Donor Category 2 lists, and selecting one of those values for the Non-Receiptable donor.

You will notice that beside each Category name on this maintenance window, there is a display-only field "Receiptable", to show whether that category is Receiptable or Non-Receiptable. It shows a check mark for Receiptable, or an "X" for Non-Receiptable. This is based on the categories being Non-Receiptable if they contain exactly "Non-Receiptable", or start with "NR " ("NR", plus a space), or end with " NR" (a space, plus "NR"). ("NR" alone is not sufficient - it must start or end with that, **and** have an extra space as explained in the previous sentence.) Examples of the latter would be "Member NR" or "NR Member". "NR" is an abbreviation for "Non-Receiptable".

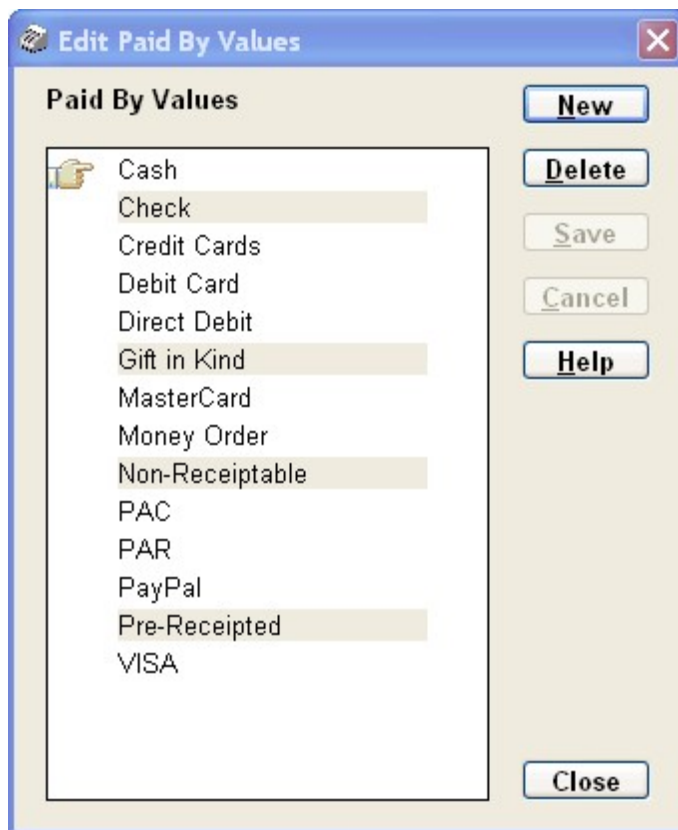
Individual donations can also be marked as Non-Receiptable, even for donors who are otherwise Receiptable. For details on the ways to mark a donation as Non-Receiptable, please see [Non-Receiptable Donors and Donations](#).

## 13.6 Donation Paid By Values

You can edit the list of Paid By values that appear in the drop-down list for the [Cheque # / Paid By](#) field for donations, by using the **Maintenance ⇒ Donation Paid By Values** menu option. (However, you can type anything into that field that you want - this list is just some defaults that you can more easily select.)

The most common uses of this feature will probably be to add a Paid By value that your organization uses that isn't on the default list, or to delete some values that you don't use, in order to make the list shorter.

The **Maintenance ⇒ Donation Paid By Values** menu option brings up the following window:



You will notice that some of the values are greyed out - they cannot be edited or deleted. That's because they are values that are used for special purposes in the program, as follows:

- **Check** (for US users) or **Cheque** (for Canadian and other users): This is used to identify cheques, if you don't choose to actually type the cheque number into the Cheque # / Paid By field. Some reports total donations by the Paid By value, and those reports group together any donations with actual cheque numbers in the Cheque # / Paid By field, with ones with the value "Check" or "Cheque", into one total under the name "Check" or "Cheque".
- **Gift in Kind**: Identifies [Gifts in Kind](#), that have special treatment in DONATION for Canadian users.
- **Non-Receiptable** and **Pre-Receipted**: Using either of these values marks a donation as [non-receiptable](#), so it will never be included in an official receipt generated with the **Receipt** menu options.

To edit the name of an existing Paid By value on this window, just click into it, make your desired change, and click **Save**. (You can't edit the ones listed above.)

To add a new value, click **New**, type in the new value, then click **Save**. To delete a value (other than the ones listed above), click on it, then click **Delete**.

To cancel a change (an edit of an existing value, or a new value) that you have started but not yet saved, click **Cancel**.

To close this window, click **Close**.

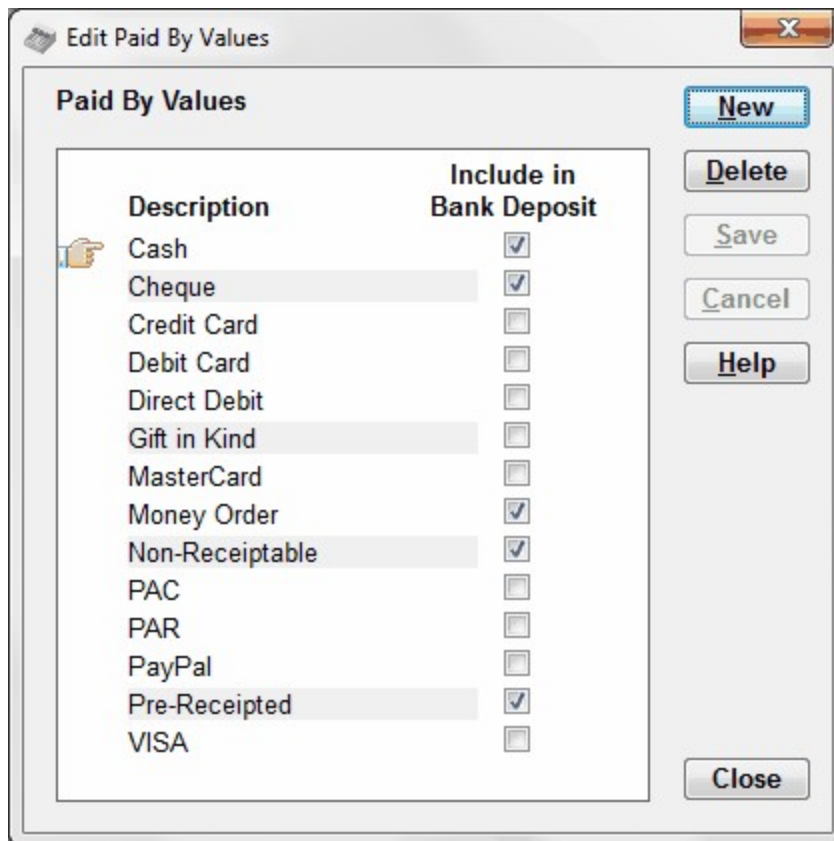


Please note that unlike [editing Donor or Donation Categories](#), changing the name of a Paid By value does **not** change the value in any existing donations using that value. And deleting a Paid By value that has been used in existing donations is allowed.

Also, in the **Donations** tab of the **Maintenance ⇒ Main Window Options** [window](#), you can set a Default Paid By value. The program does not force you to have any value that you choose to set there be a value that is on this window, but you would probably want it to be on this window. If it is on this window and you change its name here, it will not change in the **Main Window Options** window - you would have to also change it there.

#### Changes if you Configure Bank Deposits

If you configure bank deposits with the **Maintenance ⇒ Configure Bank Deposits** [menu option](#), this window gets changed to add a column for "Include in Bank Deposit", as follows:



That allows you to specify which of the Paid By Values indicate that a donation can be included in a bank deposit, and which indicate that it will never be included in a bank deposit.

It's important to remember that the values on this window are just the contents of the Cheque # / Paid By drop-down list when you are entering or editing donations, but you can always enter any other value into that field as well (such as actual cheque numbers). Any value that is not on this list is assumed to be a potential part of a bank deposit. (So, if you want to make sure that a Paid By value is **excluded** from bank deposits, it must be on this list, with the "Include in Bank Deposit" checkbox unchecked.)

## 13.7 Groups and Committees

Some users will want to record which small groups, committees etc. within their organization their donors are each members of. The Groups / Committees field in the Donor Details area allows you to do that.

If you have no interest in doing that, you can turn off the display of the Groups / Committees field with a checkbox on the [Donor Details](#) tab of the **Maintenance** ⇒ **Main Window Options** window, and then ignore the rest of this help topic.

### Initial Setup

To start recording values in that field, you first have to set up your list of Groups, with the **Maintenance** ⇒ **Groups / Committees** menu option. That brings up a window such as the following. It will initially be empty, but this example shows a few that we set up:

Short Name	Full Name
M&C	Ministry and Counsel
OFF	Officers
PER	Personnel Committee

On each row, the Short Name is an abbreviation or acronym, up to 5 characters long, that you will use for the group or committee. It is always all capital letters. The only characters it cannot include are spaces, percent signs, and single quotes. In addition, for technical reasons one row's Short Name cannot be a part of another row's Short Name. So for instance, you cannot have both "OFF" and "OFFIC" (or "OOFF"!).

The Full Name is a full name for that group or committee.

To add a row to the list, click **New**. Then you can fill in the fields, and click **Save** to save the change, or **Cancel** if you want to abandon the change.

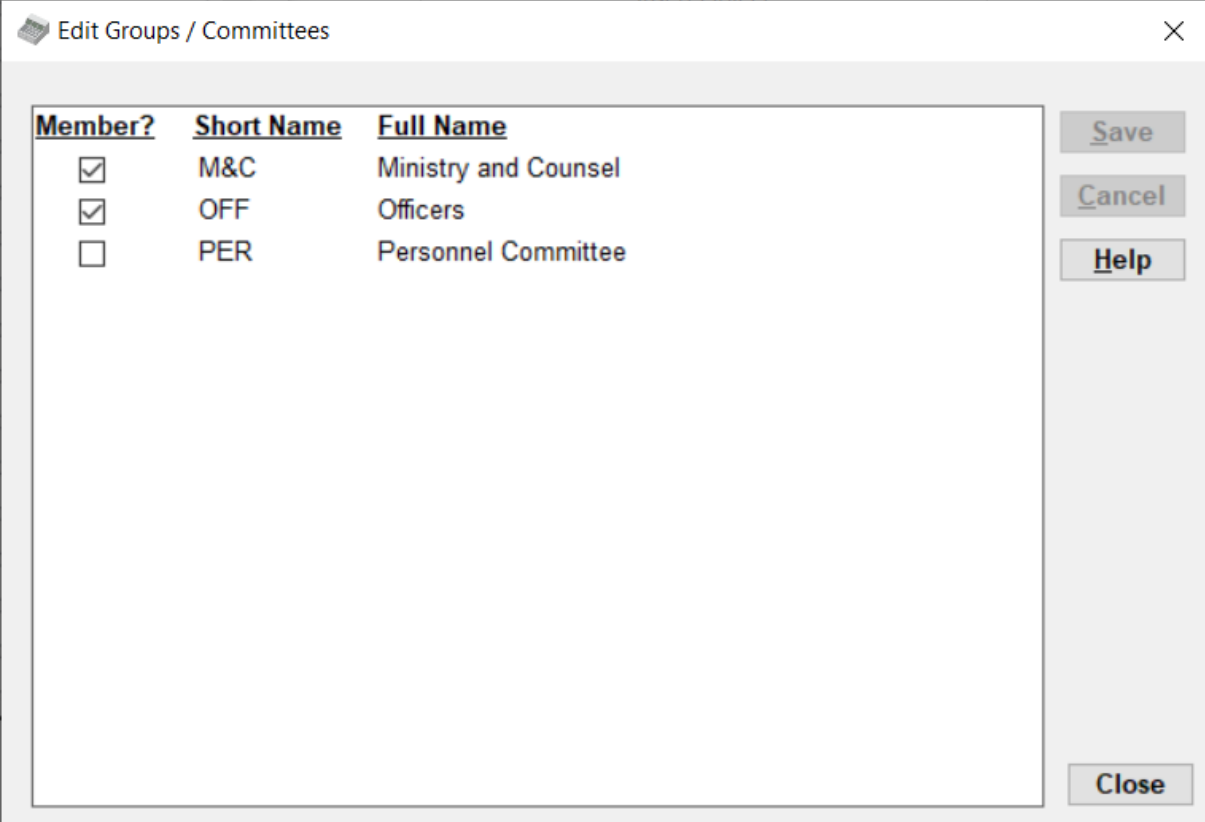
You can also click into existing fields to make changes. If you change an existing Short Name and click **Save**, you will be prompted with the fact that that will change it for all donors in the current working year for whom that has already been recorded. (The Short Names are what is actually saved in the donors' Groups field.)

If you are no longer using a group or committee on the list, you can click into its row (which makes the hand pointer point to it) and click **Delete**. If you confirm that change and there are donors in the current working year for whom that group had been specified, that group will be removed from their records.

Click **Close** when you are done with your changes in this window.

### **Selecting Groups or Committees for a Donor**

To specify the groups or committees for an individual donor, click into its Groups / Committees field in the Donor Details area of the main window, or click on the drop-down arrow at the right of that field. That will bring up a one-item popup menu. Click on that menu item, "View/Edit Groups / Committees". That will bring up a window such as the following. This example is for a donor for whom a couple of groups have already been specified:



<u>Member?</u>	<u>Short Name</u>	<u>Full Name</u>
<input checked="" type="checkbox"/>	M&C	Ministry and Counsel
<input checked="" type="checkbox"/>	OFF	Officers
<input type="checkbox"/>	PER	Personnel Committee

Buttons: **Save**, **Cancel**, **Help**, **Close**

To specify that the current donor is or isn't a part of the group or committee on a given row, check or uncheck the "Member?" checkbox on that row. (Or you can click on its Short Name or Full Name to check or uncheck the checkbox.)

When you are done making changes, click **Save** to save them, or you can click **Cancel** to abandon them.

Click **Close** to close the window.

If you have saved changes, those changes will be reflected in the Groups field in the Donor Details area. What is displayed and stored there is the Short Names that you have checked "Member?" for, separated by spaces. You then still have to **Save** the change for the donor itself, on the main window.

### **Groups are by Year**

Each working year in the program has its own list of Groups / Committees. When you first change to a new year, or a year that does not have such a list, the current year's list will be copied over.

That way, you can make changes in one year that do not affect other years. This is similar to how it works with donor categories and donation categories.

### **Where and how can you use Groups / Committees?**

You can select the Groups field in:

- [Custom Reports](#): The Groups field containing the Short Names, as shown in the Donor Details, is printed when you selected Groups / Committees there.
- [Mail-merge](#) letters or receipts: The Full Names are printed when you select the [mail-merge field](#) «Groups/Committees».

In addition, a number of built-in reports, including ones showing Addresses or Contact Info, Envelopes, Labels, and Summary by Dollar Ranges, include the Groups field (and also the two Donor Category and six Other Info fields) as invisible fields that are not displayed, but you can filter on them.

Suppose you wanted to print mailing labels for only the donors that you had specified were in the Personnel Committee (indicated in the examples above by the Short Name "PER"). You would create the mailing labels (for instance, with **Reports** ⇒ **Donor** ⇒ **Mailing Labels**) then click **Filter**. See [Filtering Reports](#) for details on filtering. The entry you would make in the Filter window for this example would be as follows:

Column	Operator	Value	And/Or
groups	Like	%PER%	

Basically that means that "PER" appears anywhere in the donor's Groups field, and thus when you clicked **OK** in the filter window, it would restrict the displayed mailing labels to exactly the desired donors.



## 14 RECORDING COMMUNICATIONS WITH DONORS

### 14.1 Recording Communications with Donors

Starting in Release 5.06 of DONATION, the program automatically records many communications with your donors, such as sending them [receipts](#) or mail-merge [letters](#) . It also allows you to manually record other communications (such as phone calls or personal visits) and allows you to both maintain and report on such communications.

Viewing and editing recorded communications is also not available to users logging in to other versions with a Donor Only or Limited User [password](#) or permissions.

This page covers the following aspects of these features:

- [Why Record Communications?](#)
- [Automatic Recording of Communications](#)
- [Manual Recording and Editing of Communications](#)
- [Viewing Reports on Communications](#)

#### Why Record Communications?

There are two main reasons this feature was introduced: to solve a problem that can occur when emailing receipts to all donors, and to help organizations that use DONATION who do fundraising to track their communications.

The problem that can occur when emailing a group of receipts is that, in unusual circumstances, it can stop in the middle of emailing them with an error. You may not be able to be sure where it stopped from the messaging (or may have failed to record that from the messaging), so you may not know where to restart it (with the **Receipt ⇒ Reprint Range** [menu option](#)).

In that unusual case when the emailing stopped in the middle, you could go to the Communications [report](#), see which ones were just successfully emailed, and from there (and possibly also the **Reports ⇒ Receipt ⇒ All Receipts** report) determine which ones you need to redisplay with **Receipt ⇒ Reprint Range**, and then restart the emailing.

The second main use is for organizations doing fundraising, to track all communications with donors, whether automatic or manual, be able to review those records of communications and add comments, and use that to help determine what else they want to do.

#### Automatic Recording of Communications

DONATION automatically records all of the following communications you can do with donors:

- Printing, emailing, or saving [receipts](#) to PDF files. (Sample receipts are not recorded.)
- Printing, emailing or saving [statement reports](#) to PDF files.
- Printing, emailing or saving [mail-merge letters](#) to PDF files, with **Letters ⇒ One Letter** or **Letters ⇒ Mass Mailing**.
- Directly [emailing to donors](#) with **Letters ⇒ Email Donors**.

In all of those cases above, communications are **not** recorded if you email the receipts, statements, letters, etc. only to yourself, having set the relevant option for [emailing receipts only to yourself](#).

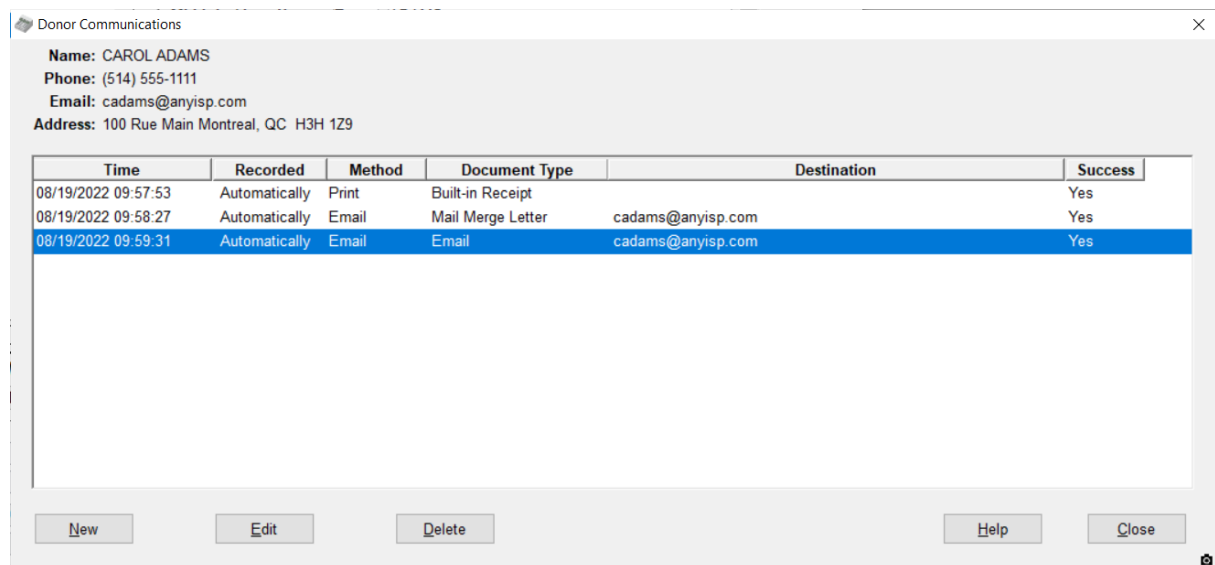
If you generate [duplication or corrected receipts](#), the communications that are recorded include the status of the receipt.

Further automatically recorded communications are:

- Directly [emailing a single donor](#) by right-clicking on their email address and picking **Send Email** from the popup menu, or equivalently using the **File** ⇒ **Send Email** menu option.
- Deleting previously-generated receipts with the **Receipt** ⇒ **Delete Range** [menu option](#). (While this is not a communication itself, it will clarify what has happened with the receipts of any donor that had their receipt deleted, avoiding misleading information showing if you review the communications with them.)

### Manual Recording and Editing of Communications

You can view the currently selected donor's previously recorded communications, edit them, and record manual communications, with the **Maintenance** ⇒ **Current Donor Communications** menu option. That will bring up a window such as the following:



This sample shows three automatically recorded communications - a printed receipt, an emailed mail-merge letter, and a directly-sent email.

The **New** button brings up the following window to allow you to enter a communication manually:



Donor Communication

Name: CAROL ADAMS  
Phone: (514) 555-1111  
Email: cadams@anyisp.com

Time: 08/19/2022 10:09:19  
Recorded: Manually  
Method:   
Document Type: None  
Success: Yes  
Destination:   
Document Name:   
Comments:   
Browse

Save Help Cancel

Most commonly you would use this for manually recording phone calls or visits.

The **Edit** button in the first window above brings up the same details window, filled in with the details from the currently-selected row in that first window listing the communications. For Automatically recorded communications, the only field you can edit is the Comments. For Manually recorded communications, you can edit all fields.

The **Delete** button in the first window above allows you to delete a record of a communication, after confirming that you want to do so. You can only delete manually-entered communications records.

### Viewing Reports on Communications

You can see a report on one or all donors' communications with **Reports ⇒ Donor ⇒ Recorded Communications**. That prompts for whether to report on All Donors or just the Current Donor, and for a range of dates of communications to include. The report includes all communications fields except for the Comments field. If you need to see the Comments field for specific donor communications, select that donor on the main window, use **Maintenance ⇒ Current Donor Communications**, select the relevant communications row, and click **Edit**.

## 15 HANDLING BANK DEPOSITS

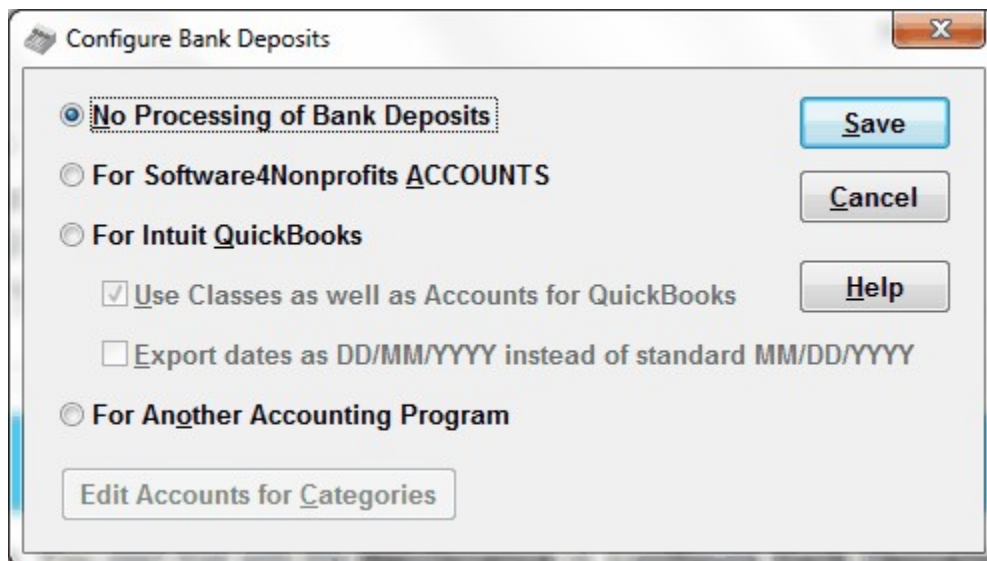
### 15.1 Configuring Bank Deposits

In DONATION, you can select groups of donations to make up one bank deposit, print a report for that bank deposit, and optionally export a summary transaction representing that bank deposit to one of two accounting programs: Software4Nonprofits [ACCOUNTS](#), or Intuit QuickBooks Desktop.

If you are using [Abundant](#) online donations, they have their own bank deposits feature, for confirming the amounts deposited to your bank, reporting on them, and exporting them for importing into your accounting program. The same configuration steps given in this Help topic are also needed before you can use the Abundant [bank deposits](#) features.

You do not have to use the features in DONATION about bank deposits. They are unavoidably a bit complicated, and organizations have used DONATION with no problems for many years without these features being available. For many users, they can see what will be in their bank deposit with other reports, like the **Reports** ⇒ **One Date Donation** [report](#) (especially for churches) or various of the **Reports** ⇒ **Donation** ⇒ **All Donations** [reports](#), with a suitable date range selected. Also, the features for specifying bank deposits will not work well for users with more complex situations, such as depositing some donations into one bank account, and other donations into another bank account.

If you do wish to process bank deposits in DONATION, you first need to do some configuration. You start that with the **Maintenance** ⇒ **Configure Bank Deposits** menu option. That brings up the following window:



Select which accounting program you will be using from the radio buttons.

If you are using QuickBooks Desktop, the checkbox for "Use Classes as well as Accounts for QuickBooks" will become enabled, and you can check that if you do use classes with your income accounts that match the donation categories in DONATION.

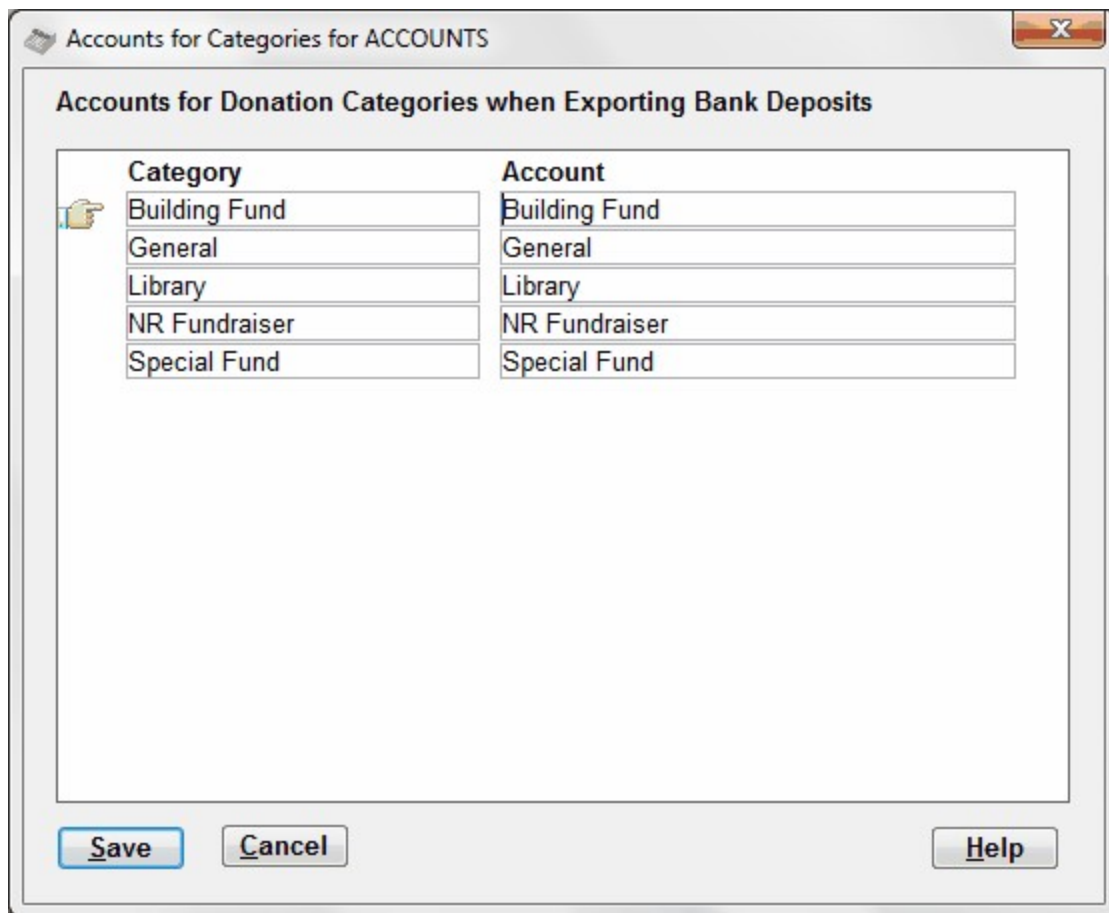
Also if you are using QuickBooks Desktop, the checkbox for "Export dates as DD/MM/YYYY instead of standard MM/DD/YYYY" will become enabled. Intuit's documentation about the IIF import file format that DONATION exports to, for importing into QuickBooks Desktop, says that dates in such files should always be in the format MM/DD/YYYY. Unfortunately, in our experience at least sometimes if the computer running QuickBooks Desktop has a Short Date Format (as set in Windows Control Panel's Region and Language tool) with the day preceding the month (such as DD/MM/YYYY), imports of IIF files with the date in the MM/DD/YYYY format will either fail with an error message, or reverse the day and the month in the import. If you encounter this problem, and the Short Date Format on your computer running QuickBooks Desktop is something like DD/MM/YYYY, you will need to check this checkbox.

Click **Save** to save your selection. After that, some messages will come up, and two additional windows for further configuration will be opened for you.

**Note:** Unlike QuickBooks Desktop, QuickBooks Online does not have a facility for importing the sort of export files exported by DONATION, IIF files. So as with any other bookkeeping or accounting program other than DONATION or QuickBooks Desktop, you can just manually enter the printed-out summary transaction for Bank Deposits into QuickBooks Online. There are apparently also 3rd-party programs that allow for the importing of IIF files into QuickBooks Online, but doing that would not be supported by us, because it is not our product!

#### First Additional Window

The first window is for associating the names of accounts in your accounting program with your Donation Categories in DONATION:



The first time this window is displayed, it will copy each donation Category name, shown in the left-hand column, to be its first guess at the accounting program Account name, shown in the right-hand column. You can then edit the Account names in that right-hand column to exactly match whatever you have in your accounting program, corresponding to that donation category.

The Account name corresponding to each donation category must be the exact name of an Income account in your accounting program, or the eventual import into that program will not work. If you are using the ACCOUNTS program, do not use the names of Fund (equity) accounts, even if this is income that should increase that fund balance. Rather, use the name of an Income account that is linked to that Fund account.

**Important: Do not include the accounting program's account number at the start of the Account field value.** Only the account's name should be there, or neither ACCOUNTS nor QuickBooks will be able to import exported bank deposit transactions correctly.

If you selected ACCOUNTS, and it is installed on the same computer you are running DONATION on, if possible the Account field will be changed to a drop-down list of the usable Income accounts from ACCOUNTS, so that you can just select them from the list. In that case, the Account isn't editable - you must select from the list, to be sure it's an existing ACCOUNTS Income account! You will need to be sure that you have set up all of the desired Income accounts in ACCOUNTS before you do this configuration.

If you selected QuickBooks, and the checkbox for using Classes, the window displayed above will have an additional column on each row, for the Class, You can fill that in as well, when needed.

For QuickBooks Desktop, if any of the associated accounts are sub-accounts, you need to put in the full name, for example "Parent Account:Sub Account" (without the quotes). A colon separates each level of parent and sub account. If classes are displayed and you are using sub-classes, they need to be separated by colons in the same way, for example "Parent Class:Sub Class".

It's important to understand that for QuickBooks Desktop, if there are any mismatches of the account names entered here with your actual account names in QuickBooks, the import of the bank deposit transaction will still be accepted, but it will create new accounts in QuickBooks (all of them considered to be bank accounts!) for the incorrect account names. Sorry, we cannot control this, it's just how QuickBooks transaction importing works! For importing into ACCOUNTS, any mismatched account names will cause the import to be rejected, with a helpful explanatory error message saying exactly what is wrong.

Also for QuickBooks Desktop, all matched accounts must be Income accounts in QuickBooks (not Other Income, or any other type) or the imports will not work.

Although in our testing with QuickBooks 2012 Pro the matching of account names is not case-sensitive (the names can vary in the use of upper and lower case between DONATION and QuickBooks), their documentation is silent on that point, and various websites for other products that integrate with QuickBooks say that the matching **is** case-sensitive. So it will be safer to use the account names in the exact same case as you have them in QuickBooks. For ACCOUNTS, the matching of account names is definitely not case sensitive.

For ACCOUNTS, the Income accounts you use must be bottom-level accounts, i.e. there must not be sub-accounts or sub-sub-accounts underneath them.

If you leave any of the Account entries empty, donations with that donation category will never be included in a bank deposit (because there is no account associated with it). Normally you would associate accounts with all categories.

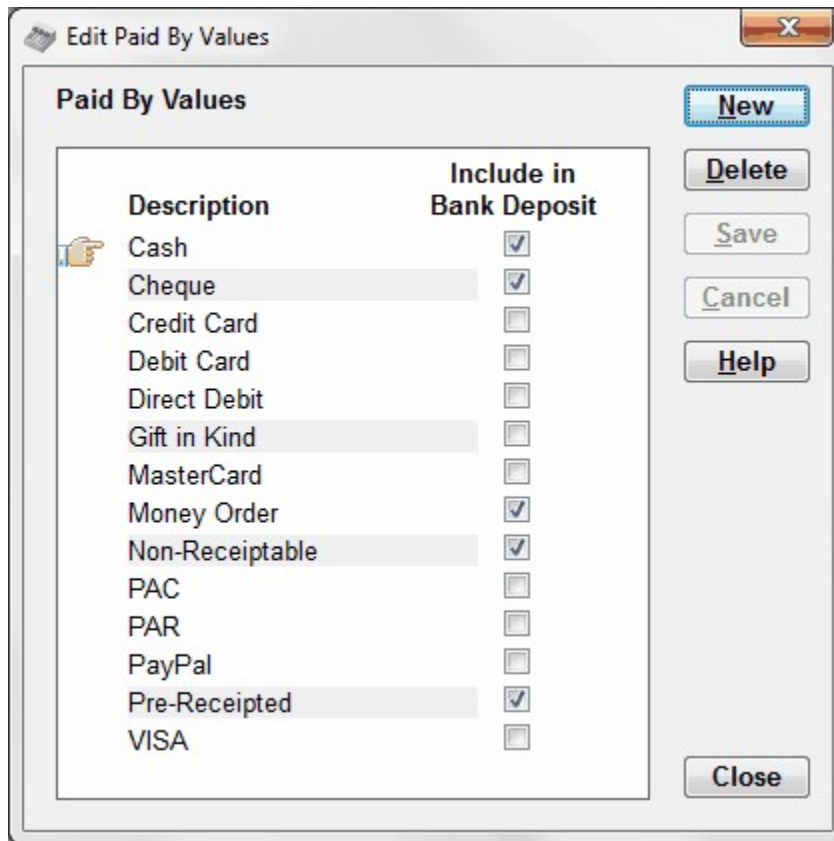
When you are finished making changes, **Save** them, then close the window.

Note: If you just need to edit the accounts associated with donation categories, you can access this window by going into **Maintenance** ⇒ **Configure Bank Deposits** and using the **Edit Accounts for Categories** button. (You will also be prompted to go to this window if you edit categories with **Maintenance** ⇒ **Donation Categories**, after configuring to process bank deposits.)

If it is important to have a distinction between receiptable/receipted income and non-receipted income in your accounting program, please see the section on [Non-Receiptable Donations](#) for some important details about how this works with bank deposits.

### Second Additional Window

The next window is a variation of the regular **Maintenance** ⇒ **Donation Paid By Values** window, as follows:



This allows you to specify which Paid By values for donations are ones that indicate the donation will be included in a bank deposit, and which ones will be excluded (because they get into your bank, and/or your accounting program, in a different way). Review those values carefully, make any desired changes (by checking or unchecking the "Include in Bank Deposit" checkbox) then **Save** the changes, and close the window.

It's important to remember that the values on this window are just the contents of the Cheque # / Paid By drop-down list when you are entering or editing donations, but you can always enter any other value into that field as well (such as actual cheque numbers). Any value that is not on this list is assumed to be a potential part of a bank deposit. (So, if you want to make sure that a Paid By value is **excluded** from bank deposits, it must be on this list, with the checkbox unchecked.)

This window actually replaces the normal **Maintenance** ⇒ **Donation Paid By Values** [window](#) once your Bank Deposits have been configured.

What happens next?

After you have configured your bank deposits, you can create specific bank deposits with the **Maintenance** ⇒ **Create Bank Deposit** [menu option](#).





**Note:** If you have configured [Abundant](#) online donations, you instead bring up this window for bank deposits of cash, cheques etc. with the **Maintenance ⇒ Create Bank Deposit ⇒ Cash and Cheques** sub-menu option (or **Cash and Checks** for users in the U.S.A.). There is then also a 2nd option on that sub-menu, **Maintenance ⇒ Create Bank Deposit ⇒ Abundant Donations**, for [Abundant bank deposits](#). This Help page is only about the window for Cash and Cheques etc., not Abundant.

If you have configured in the [Donations tab](#) of **Maintenance ⇒ Main Window Options** to not show the Eligible Amount field, the **Advantage Account** field will not be displayed. The Eligible Amount is relevant if you are using [Split Receipting](#), for example for fundraising events, where there is a Total Amount donated, and an Eligible Amount (the amount the donor can claim on their taxes). The difference between those two amounts is called the "Advantage" by the Canada Revenue Agency. When creating bank deposits and exporting them to accounting programs, DONATION always assumes that the amount of the advantage, regardless of the donation category of that donation, will go to the same accounting program account. You specify that account in that "Advantage Account" field, which must be the name of an income account in your accounting program.

Further to this, if you specified in your [bank deposit configuration](#) that you were using QuickBooks, and using Classes in addition to Accounts, the **Class** field displays beside the **Advantage Account** field, for the Advantage Class - the QuickBooks class to be used for any Advantage amounts exported to the Advantage Account. (Note: you are never prompted for a class for the Bank Account, because generally classes are only used in QuickBooks for income and expense accounts, not asset accounts like banks.) If you are not displaying the Eligible Amount field, not using QuickBooks, or not using Classes, the **Class** field is not displayed.

#### How to use this Window for New Bank Deposits

Fill in the desired **Bank Deposit Date**, which defaults to today's date, and the date for **Include Donations Starting on**. That allows you to specify how far back to look for donations that might be included in this bank deposit. Both of these date fields have a button to their right for popping up a calendar, if you prefer to select the dates in that way.

The **Include Donations Starting on** date must be in the program's current working year, which is usually a calendar year. If you are in a country like the United Kingdom, Australia or New Zealand and you are [Using Fiscal Data Entry and Receipting](#), and you are working on a year that is a fiscal year, the date you enter will have to be within that fiscal year. Only donations within the current working year will be considered for inclusion in the bank deposit.

If you have moved into a new working year with **Maintenance ⇒ Change Year**, and need to do a bank deposit including donations from the previous year, you will need to temporarily switch back to that year with the same menu option to do a bank deposit including only the remaining donations in that year. Then you can switch back to the new year, and do a 2nd bank deposit (if necessary) containing the new donations in this year. Sorry, there is no way to have one bank deposit contain donations in multiple working years.

Fill in the **Deposit to Bank Account** name, the bank's **Acct #** for that bank account (not the one in your accounting program!), and if they are displayed, the **Advantage Account** and Advantage **Class**. (For QuickBooks, if either of those accounts is a sub-account, you have to enter the full name, separated by colons, for example "Parent Account:Sub Account".) **Do not**

**enter the account numbers** in any of these fields - just the exact names as they are listed in your accounting program.

You can type the desired account names into those three fields. However, after the first time you have used this window, the account name and number and optional class names will be memorized for you and displayed in a drop-down list for each field, showing the values you have used within the last 365 days. The most recently used values will also be automatically redisplayed each time you return to this window. You can select alternate values from the drop-down lists by just starting to type their names, and they will pop up, or of course you can type in something different if that is appropriate.

If you are using ACCOUNTS as your bookkeeping program, and it is installed on the same computer you are running DONATION on, what is in those drop-down lists changes. If possible, the **Deposit to Bank Account** field will instead be changed to a drop-down list of the usable Bank accounts from ACCOUNTS. And if the **Advantage Account** field is displayed, it will be changed to a drop-down list of the usage Income accounts from ACCOUNTS.

For QuickBooks Desktop, although in our testing with QuickBooks 2012 Pro the matching of account names is not case-sensitive (the names can vary in the use of upper and lower case between DONATION and QuickBooks), their documentation is silent on that point, and various websites for other products that integrate with QuickBooks say that the matching **is** case-sensitive. So it will be safer to use the account names in the exact same case as you have them in QuickBooks. For ACCOUNTS, the matching of account names is definitely not case sensitive.

Then, click the **Retrieve Donations** button. The program will then look to see whether you have a previous bank deposit on the same date, perhaps with the same bank account name and number. If so, you will be prompted with an option (or in some cases required) to edit that existing bank deposit instead of creating a new one.

If it's a brand new bank deposit, a list of donations will then be retrieved that satisfy all of the following criteria:

- Their donation date is at least the specified **Include Donations Starting on** date, and is in the current working year.
- They have not been included in a previous bank deposit.
- They have accounting accounts associated with their donation categories (in the window for [associating accounts with categories](#)).
- They don't have a Cheque # / Paid By value that has "Include in Bank Deposit" **unchecked** on the **Maintenance ⇒ Donation Paid By Values** [window](#).
- The Amount is greater than zero.

If you are editing an existing bank deposit, on the other hand, whichever donations were previously included in that bank deposit will also be retrieved, whether or not they still match those criteria above, along with any new donations satisfying the criteria above. That will allow you to add further donations to the same deposit.

If you are doing a new bank deposit, and one or more donations do not appear in the window shown below that you think should be eligible to be included in that deposit, it must be because one or more of the bullet points above is not satisfied. If you can't figure it out, you can use

**Reports ⇒ Bank Deposit ⇒ All Donations with Deposit Status** to see the status of every donation with a range of dates that you specify, with whether they have already been included in a bank deposit, or will be omitted from a new bank deposit, and if so why, or would be included in a new bank deposit. From there you should be able to find the donation(s) in question and determine what you need to fix to get them included.

Your list of donations will appear in the middle section of the window, looking like this:

Include?	Name	Date	Amount	Category	Check# / Paid By
<input checked="" type="checkbox"/>	Abbey-Smith-Jones, Edwin & Vivien	01/01/2010	\$100.00	General	Cash
<input checked="" type="checkbox"/>	Adams, Carol	01/01/2010	\$100.00	Allocated Jamaica	Gift in Kind
<input checked="" type="checkbox"/>	Andrews, Diane	01/01/2010	\$100.00	A.Mitchell WCC GCG	Check
<input checked="" type="checkbox"/>	12345678901234567890123 456789	01/15/2010	\$15.00	General	123
<input checked="" type="checkbox"/>	12345678901234567890123 456789	01/31/2010	\$20.00	Jails - Don	
<input checked="" type="checkbox"/>	Anumanu, Mary	01/31/2010	\$20.00	Library	
<input checked="" type="checkbox"/>	12345678901234567890123 456789	02/28/2010	\$50.00	Jails - Don	
<input checked="" type="checkbox"/>	Adams, Carol	03/01/2010	\$50.00	Allocated Jamaica	
<input checked="" type="checkbox"/>	Andrews, Diane	03/01/2010	\$100.00	A.Mitchell WCC GCG	
<input checked="" type="checkbox"/>	Andrew, Eleanor	03/31/2010	\$150.00	Allocated Jamaica	
<input checked="" type="checkbox"/>	Andrews, Diane	04/01/2010	\$100.00	A.Mitchell WCC GCG	
<input checked="" type="checkbox"/>	Andrews, Diane	05/01/2010	\$100.00	Christian Peacemaker	

Unselect All      Total Deposit:      \$1,255.00

Under the **Include?** heading, there is a checkbox on each row, indicating whether or not that donation is to be included in the bank deposit. For a new bank deposit, all of the donations will start out with that checked, on the assumption that you will deposit all new donations. When you re-retrieve an existing bank deposit, only the donations that were previously saved with that Bank Deposit Date will be checked, and all new ones will be unchecked.

You can check or uncheck the Include checkmark for each donation by clicking on the checkmark, or in fact, anywhere on the line. You can also use the **Select All** button (which changes to **Unselect All** if everything is already checked, for example after retrieving donations for a new Bank Deposit Date).

The total of all donations for which you have "Include" checked shows to the right of the "Total Deposit" text below the list of donations. You can use that to confirm you have selected the right donations, that add up to the actual amount you are expecting to deposit.

When you are satisfied that you have the right donations checked, click **Save**. (If you retrieved for an existing Bank Deposit Date, and you haven't made any changes, there is no need to save, so that button is inactive.)

After the save, if there was cash included in the deposit, and you want to do so, you can click **Count Cash** to bring up the [cash counting](#) window. That will try to enforce that the total you count in that window matches the total of the saved donations in the deposit that were cash. (Cash donations are considered to be ones where the Cheque # / Paid By value of the donation exactly matches the "Word for Cash" recorded on the **Donations** [tab](#) of **Maintenance** ⇒ **Main Window Options**.)

Then, you can click **Report** (which in earlier versions was called **Print**) to display a bank deposit details report, with four sections. The first section shows the details of the donations included in the bank deposit (similar to the list in the middle of this window). The second shows the totals by donation category. The third (to the right of the second) shows the totals by Paid By, for example Cash or Cheque. The fourth shows the summary transaction that will be exported to your accounting program, if you use the **Export** button, or that can be easily manually entered into any accounting program other than ACCOUNTS or QuickBooks Desktop. You will probably want to print and save that report.

You can also click **Deposit Slip** to display and then print something that may be acceptable by your bank as a deposit slip. It consists of a list of the cheques (or more generally, all donations that aren't cash), and the count of the cash (which requires that you did the **Count Cash**, assuming there was any cash in the deposit), plus grand totals.

If you forget to print either of those reports, see the section below on [Correcting Errors in Bank Deposits](#) for how to re-retrieve a deposit on this window that you have previously saved. Having retrieved it, you can again use the **Report** or **Deposit Slip** buttons. Alternatively, you can use the **Reports** ⇒ **Bank Deposit** ⇒ **One Deposit Details** and **Reports** ⇒ **Bank Deposit** ⇒ **One Deposit Slip** menu options to print the same reports for a previously saved bank deposit entered with a specified deposit date.

#### Exporting your Transaction to a File

Next, as long as you are using either Software4Nonprofits ACCOUNTS or Intuit QuickBooks Desktop, you can use the **Export** button to export a file that can be imported into the appropriate program, which will insert a summary transaction representing the bank deposit. It will exactly match the fourth part of the report mentioned above.

If you have configured that you are using the ACCOUNTS program, and the ACCOUNTS program is installed on the same computer on which you are running DONATION, the export file will be put into the Import subdirectory of the ACCOUNTS program's data directory. (The ACCOUNTS data directory is like DONATION's [data directory](#), but ending in "Cooperstock Software\Accounts" instead of "Cooperstock Software\Donation".) Also, in this case, after the export has completed, you will be given an option to run ACCOUNTS and have it automatically prompt to import the file.

If you have configured that you are using QuickBooks Desktop, or you have configured that you are using ACCOUNTS but ACCOUNTS is not installed on your computer, the export file will be put into the Export subdirectory of DONATION's [data directory](#).

The exported file name will be BankDeposit-YYYY-MM-DD.DB.IIF for you are exporting for QuickBooks Desktop, or BankDeposit-YYYY-MM-DD.DB.S4AIF if you are exporting for ACCOUNTS, where YYYY-MM-DD is the bank deposit date you entered when creating the bank deposit. (The ".DB" part will change appropriately if this is for an additional database created with the **Database** ⇒ **Switch Databases** [menu option](#).)

In either case, you will also be given an option to email the exported file (as an attachment) to someone else. This is for the common situation where there is a separation of duties, with one person handling the donations, and another person handling the accounting.

Please see either [Importing Bank Deposits into ACCOUNTS](#) or [Importing Bank Deposits into QuickBooks](#) to learn how to import the transaction into those programs, and to understand any relevant issues.

For accounting programs other than ACCOUNTS or QuickBooks Desktop, you can just use the details in the fourth part of the details report printed out above with the **Report** button to enter the bank deposit transaction manually into that program.

If you create multiple bank deposits on the same date, for different bank accounts, their export file names will be the same, so if your accounting program is on the same computer, be careful to import the first one into your accounting program before you create the 2nd one in DONATION. Otherwise, the 2nd export file will overwrite the 1st export file! (If this does happen, you can get back to the 1st one again by re-retrieving the 1st bank deposit again in this window, as explained below under [Correcting Errors in Bank Deposits](#), then using the **Export** button again.

**Close** this window when you are done.

**Note:** Unlike QuickBooks Desktop, QuickBooks Online does not have a facility for importing the sort of export files exported by DONATION, IIF files. So as with any other bookkeeping or accounting program other than DONATION or QuickBooks Desktop, you can just manually enter the printed-out summary transaction for Bank Deposits into QuickBooks Online. There are apparently also 3rd-party programs that allow for the importing of IIF files into QuickBooks Online, but doing that would not be supported by us, because it is not our product!

### Correcting Errors in Bank Deposits

If you have saved (and perhaps printed and exported) a bank deposit, and then realize that it was not correct (the right donations were not included in it, the date or bank account was wrong, etc.), first make any relevant changes to your configuration (such as changes to how you [associate accounts with categories](#), or which donation Paid By values are included in bank deposits), if they might be part of the problem. Then come into this window, enter the Bank Deposit Date and the other fields at the top, and click **Retrieve Donations**.

You will be prompted as to whether you wish to edit the existing bank deposit to that bank on that date, and also in some cases given an explanation of how you can create additional bank deposits to the same account on the same date (a rather unusual requirement). Let's assume you agree to edit the existing deposit.

Your list of donations previously saved in this bank deposit will then be displayed, along with any others that now satisfy the criteria (including being on or after the **Include Donations Starting on** date). The additional donations that are retrieved, that were not originally saved as part of the bank deposit, will **not** have "Include" checked yet, so you can decide which of them to include. You can then make any appropriate changes, checking or unchecking the "Include" checkbox, until the bank deposit is correct. **Save** that, then as before, do any of the other actions that you need: **Count Cash**, **Report**, **Deposit Slip**, and **Export**.

When you click **Save**, if you have made any changes at the top of the window, such as changing the deposit date or bank account, you will be asked to confirm that you really want to make those changes.



If you are not sure of the bank deposit date of a prior bank deposit that you want to correct, you can use **Reports ⇒ Bank Deposit ⇒ Summary List** to see a list of all bank deposits that you have recorded this year (one line per deposit). If you need to see the full details of one of those bank deposits as a report, without using this window, you can use **Reports ⇒ Bank Deposit ⇒ One Deposit Details**.

#### Correcting Imported Transactions

In some cases, the transaction you export from DONATION may still not be correct or may be incomplete. (One example would be if there were amounts included in your actual bank deposit that you had chosen not to enter into DONATION, such as grants, because they aren't actual "donations", so they don't have to be there.)

In that case, just open up the imported transaction in your accounting program (after you import it) and adjust it as required.

#### Deleting Bank Deposits

Occasionally you might conclude that you have specified a bank deposit that you are not actually going to make, or that is so incorrect you want to start over. After specifying the bank account information and deposit date for that deposit and clicking **Retrieve Donations**, if you choose the option in the message box that comes up to edit that existing deposit, a new button for **Delete Deposit** will appear to the right of the **Retrieve Donations** button.

If you click that **Delete Deposit** button, after confirming that this is what you really want to do, the record of being part of that bank deposit will be removed from the donations that were part of it, and the record in the database of that bank deposit existing at all will also be removed. (The donations are not removed!)

If you have already exported that bank deposit and imported it into your accounting program, or manually entered it into your accounting program, you will probably also need to delete that transaction in the accounting program.

#### Creating Multiple Bank Deposits for the Same Bank and Deposit Date

This will not occur for most organizations using DONATION! But if you do ever need to create two or more bank deposits for the same bank and same deposit date, there is a trick that will allow you to do so.

Normally if you enter a bank account name and number and deposit date for which a bank deposit have already been saved, and click **Retrieve Donations**, you will be given the choice of editing the existing deposit or cancelling the retrieve and trying again with different values.

To avoid that when you know you need to create another distinct bank deposit for the same account and date, just add anything within square brackets anywhere before or after the bank account name, before clicking **Retrieve Donations**. For instance, if the bank account name that you need another deposit on the same date for is "Chequing", enter an account name of perhaps "Chequing [2]" or "Chequing [Cash]" or even "[2nd] Chequing". That will look different to the program, so it will allow you to create a new bank deposit for it, without prompting you to edit an existing one.

If you **Save** that, it will be saved with the account name you entered, including that addition in square brackets. That will also show up on any bank deposit reports that you print from within DONATION. However, if you click **Export** to export a transaction file for importing into ACCOUNTS or QuickBooks Desktop, the extra text within the square brackets will be removed from the bank account name (changing the account name in the examples in the previous paragraph back to "Chequing"). That will ensure that it is imported into the correct account in your accounting program.

### 15.3 Counting Cash

You can count and total cash donations (coins and bills) with the Cash Counting window in the program. You can access that window from any of three different places:

- The **Maintenance** ⇒ **Count Cash** menu option, or
- The **Count Cash** button at the bottom of the [Batch Entry](#) window (after entering all of the cash donations on that window, so that the total can be confirmed), or
- The **Count Cash** button at the bottom of the [Bank Deposit](#) entry window (after selecting to Include all of the cash donations on that window, and clicking **Save** on the deposit, so that the total can be confirmed).

#### Initial Setup

The first time you try to use the Count Cash window, the following setup window comes up, for you to confirm exactly which denominations of coins and bills you want to count in your country. The example window below is for Canada, but it will come up differently for different countries. (Currently the program knows the standard coins and bills for Canada, the U.S.A., Australia and New Zealand - all others are initially set up to start with the choices from the U.S.A., which you can then edit.) The default coins listed for the U.S.A. include the 50 cent and \$1 coins - if you never really see those coins, you can delete them from the list.



Denomination	Display Name	Coin/Bill
\$0.05	Nickels	Coin ▼
\$0.10	Dimes	Coin ▼
\$0.25	Quarters	Coin ▼
\$1.00	Loonies	Coin ▼
\$2.00	Toonies	Coin ▼
\$5.00		Bill ▼
\$10.00		Bill ▼
\$20.00		Bill ▼
\$50.00		Bill ▼
\$100.00		Bill ▼

As you can see, you get to specify the **Denomination** (amount) of each coin or bill, you can optionally give them a **Display Name** for use in the actual Count Cash window, and you have to specify whether each is a Coin or Bill. (That allows totals to be generated for coins and bills, and also allows for places like the U.S.A. where there is both a \$1 coin and a \$1 bill!)

If there aren't standard names for any of the coins or bills in your country, or you would rather just use the denominations when doing actual entry of a cash count, just leave the **Display Name** fields empty.

If there is an entry there that you don't want, click into any field in its row and click the **Delete** button. To add another coin or bill, click **New** then fill in the details in the empty row that comes up. Don't worry about the sort order - that will be fixed when you click **Save** to save your change. You can also just edit the contents of any fields in any rows, then click **Save**. As always, when there are changes you can **Cancel** if you want to abandon your change. If you have made some changes and don't like them, the **Reset to Defaults** resets them to their original settings for your country. Click **Close** when you are done in this window.

### Counting Cash

Once that setup has been done, when you use any of the three methods for bringing up the cash counting window listed at the top of this page, the following window comes up:

Cash Counting for 12/03/2016		
# Coins / Bills	Denomination	Total
X	Nickels	=
X	Dimes	=
X	Quarters	=
X	Loonies	=
X	Toonies	=
X	\$5.00 Bills	=
X	\$10.00 Bills	=
X	\$20.00 Bills	=
X	\$50.00 Bills	=
X	\$100.00 Bills	=
Total Coins:		\$0.00
Total Bills:		\$0.00
Total Cash:		\$0.00

As you will see, in the **Denomination** column, any Display Names from the setup window are shown, or where there is no Display Name, it just shows the denomination and whether it's a coin or bill.

All you have to do is enter the counts of each type of coin or bill that you received in the **# Coins / Bills** column. As you enter each one and **Tab** or click out of that field into another one, the totals are shown at the bottom - Total Coins, Total Bills, and the overall Total Cash. Just leave the count empty for any denominations of coins or bills that you didn't receive.

If you came into this window from either Batch Entry or a Bank Deposit, the totals of Cash donations in those windows will be passed into this window, and instead of the heading at the top showing just for instance "Cash Counting for 12/03/2016" as shown in the above example, it will show something like "Cash Counting for 12/03/2016: Expected Total \$123.45".

When you click **Save** to save your count, it will first compare the Total Cash from what you have entered to the Expected Total if one was displayed, and warn you if they do not match. If they don't, you will have to decide whether to save it anyways - you can make more changes

after that and save again. You will also have to decide where the problem is and thus what needs to be corrected - it could be the counts you entered here, or it could be the values from the previous window (Batch Entry or Bank Deposit) that added up to the Expected Total.

The **Print** button prints a report that is basically identical to the contents of the window. You don't have to **Save** before you **Print**. Please note, however, that if you are creating a Bank Deposit, there is a new Deposit Slip report from that window that includes both a list of the cheques and any cash count you have done from that window, so if you are going to print that report, there is no need to print from this window.

The **Setup** button takes you to the initial setup window for specifying which denominations of coins and bills you want to count for your country, as shown at the [top](#) of this Help page. If you have already entered some counts of coins or bills on this window when you click **Setup**, those counts will be lost (after you are asked whether that is OK).

Click **Close** when you are finished in this window and have saved the count.

### **Prompting to use Previous Counts**

When you click **Count Cash** from a Batch Entry window, if a previous count was saved for the same date from the Batch Entry window, you will be prompted with an option to load that as your initial count. That lets you continue work on a count as you correct or add to the batch entry. Of course, if you are entering two independent batches for the same date, answer No when prompted whether to load the previous count, when you are doing the second batch.

When you click **Count Cash** from a Bank Deposit window, if a previous count was saved for the same bank deposit, it will first be loaded. If not, and if a count was saved from a Batch Entry window or the **Maintenance** ⇒ **Count Cash** menu option less than a week prior to the Bank Deposit date, you will be prompted with an option to load that as your initial count.

## **15.4 Importing Bank Deposits into ACCOUNTS**

[ACCOUNTS](#) is a simple and affordable bookkeeping program for churches and charities, also from Software4Nonprofits. It includes simple and automatic fund accounting.

Once you have exported a summary bank deposit transaction from DONATION's **Maintenance** ⇒ **Create Bank Deposit** [window](#), or the **Maintenance** ⇒ **Create Bank Deposit** ⇒ **Abundant Donations** window if you are using the [Abundant](#) online donation system, there are a couple of different ways to import it into ACCOUNTS.

If you have configured that you are using the ACCOUNTS program, and the ACCOUNTS program is installed on the same computer on which you are running DONATION, the export file will be put into the Import subdirectory of the ACCOUNT's program's data directory. (It is like DONATION's [data directory](#), but ending in "Cooperstock Software\Accounts" instead of "Cooperstock Software\Donation".)

Also, in this case, after the export has completed, you will be given an option to run ACCOUNTS and have it automatically prompt to import the file. Answer Yes to the question about that, and as long as ACCOUNTS isn't already running, it will start up and prompt you about whether to import the file. Answer Yes, and it will be imported.

DONATION will also always give you an option to email the exported bank transaction file (as an attachment) to someone else. So, if ACCOUNTS isn't on the same computer, answer Yes to the question about that, fill in the desired recipient of the email, and send it. Of course, you can also transfer the file in any other way that wish, for instance copying it to a USB memory key and bringing that to the other computer. (The exported file, in the case when ACCOUNTS isn't on the same computer, will be in the Export subdirectory of DONATION's [data directory](#).)

The exported file name is always BankDeposit-YYYY-MM-DD.DB.S4AIF, where YYYY-MM-DD is the bank deposit date you entered when creating the bank deposit or for Abundant donations, the date you exported the file. (The ".DB" part will change if this is for an additional database created with the **Database** ⇒ **Switch Databases** [menu option](#).)

In ACCOUNTS, please see the help topic on "Importing Transactions" for details on importing the file.

In brief, if ACCOUNTS wasn't on the same computer, so you didn't have it automatically imported, you have a few options. The first is to save the file on the other computer, right-click on it in Computer or My Computer, and pick "Import into ACCOUNTS" from the popup menu. You can alternatively just double-click the file to have it imported. Or, you can use the **Database** ⇒ **Import Transactions** menu option.

### Everything Must Match

ACCOUNTS takes a cautious approach to importing transactions. Every account name used in the import file (the export file from DONATION) must already exist in ACCOUNTS; the accounts must not have sub-accounts (because you are not allowed to post transactions to accounts that have sub-accounts); and the accounts must have the correct account classes (asset, liability, income or expense).

If anything doesn't match perfectly (except perhaps for different capitalization of account names) you will be given a detailed error message and the import will be canceled. You can then make appropriate fixes, and try the export from DONATION and import into ACCOUNTS again. (Possible fixes include correcting the account names associated with donation categories in DONATION, or adding missing accounts into ACCOUNTS.)

**Important:** One common error is if you included the ACCOUNTS account number at the start of the Account that you matched to a donation category when you were [configuring](#) the bank deposits. That will never match properly, and will cause your import to fail.

This is unlike QuickBooks Desktop, which unfortunately will create a new bank account for any mismatching account name, whether that account is supposed to be a bank or an income account, without even telling you it is doing so!

### Issues about Importing Twice

If you import the same file into ACCOUNTS twice by mistake, it will notice that fact, and give you some options about what to do about it. The options are to replace the previously imported transaction, import it twice anyways (causing a duplicate), or cancel the import.

Please note, however, that if you export a bank deposit for the same date twice from DONATION, and import the two generated files into ACCOUNTS, you will still get a duplicate

transaction. That is because the checking is based on a unique transaction ID that DONATION puts into the import file, but each time you do an export, a different unique transaction ID is generated.

### Correcting Imported Transactions

In some cases, the transaction you export from DONATION may not actually represent your entire bank deposit. (One example would be if there were amounts included in your actual bank deposit that you had chosen not to enter into DONATION, such as grants, because they aren't actual "donations", so they don't have to be there.)

In that case, just open up the imported transaction in ACCOUNTS and adjust it as required.

## 15.5 Importing Bank Deposits into QuickBooks

In DONATION, you can select groups of donations to make up one bank deposit, print a report for that bank deposit, and optionally export a summary transaction representing that bank deposit to one of two accounting programs: Software4Nonprofits [ACCOUNTS](#), or Intuit QuickBooks Desktop.

**Note:** Unlike QuickBooks Desktop, QuickBooks Online does not have a facility for importing the sort of export files exported by DONATION, IIF files. So as with any other bookkeeping or accounting program other than DONATION or QuickBooks Desktop, you can just manually enter the printed-out summary transaction for Bank Deposits into QuickBooks Online. There are apparently also 3rd-party programs that allow for the importing of IIF files into QuickBooks Online, but doing that would not be supported by us, because it is not our product!

To import bank deposits from DONATION into QuickBooks, you first have to [configure bank deposits](#) once, and then [create a bank deposit](#) whenever you are doing one. If you are using the Abundant online donation system that is integrated with DONATION, see [Abundant bank deposits](#) for details on exporting from it.

If you export it for QuickBooks with the **Export** button on the window for creating a bank deposit, it will be put into the Export subdirectory of DONATION's [data directory](#). The exported file name is always BankDeposit-YYYY-MM-DD.DB.IIF, where YYYY-MM-DD is the bank deposit date you entered when creating the bank deposit or for Abundant, the date of the export. (The ".DB" part will change if this is for an additional database created with the **Database** ⇒ **Switch Databases** [menu option](#).)

DONATION will always give you an option to email the exported bank transaction file (as an attachment) to someone else. So, if QuickBooks Desktop isn't on the same computer, answer Yes to the question about that, fill in the desired recipient of the email, and send it. Of course, you can also transfer the file in any other way that wish, for instance copying it to a USB memory key and bringing that to the other computer. If you email the file, the recipient will have to save the attachment to a folder where they can find it, for importing into QuickBooks.

The following instructions explain how to import the file into QuickBooks Desktop. They are based on QuickBooks Pro or Premier 2012. Other versions should follow similar instructions. (If your version's steps turn out to be significantly different, please carefully write down the steps required to do the import, and send them to us, along with your QuickBooks version number/name, so we can update these instructions.)

1. Open QuickBooks Desktop, and be sure you are in the correct "company", if you have multiple companies for multiple organizations.
2. Use the menu option **File** ⇒ **Utilities** ⇒ **Import** ⇒ **IIF Files**.
3. Navigate to and select the file exported from DONATION, which will be named BankDeposit-YYYY-MM-DD.DB.IIF, where YYYY-MM-DD is the Bank Deposit Date, and the ".DB" part may be different if you have multiple DONATION databases. (If QuickBooks is on the same computer as DONATION, you can find the file in the Export subdirectory of the DONATION [data directory](#).)
4. If the import worked, you will receive a message saying "Your data has been imported."
5. Open the deposit in QuickBooks (either in the Record Deposits window, or the Register window) and review it to make sure it is correct.

#### Warning about Account Matching for QuickBooks

There are some complications about importing bank deposit (or other transaction) information into QuickBooks Desktop, which it is important that you understand. Some details are on the Intuit web page <http://support.intuit.ca/quickbooks/en-ca/ig/Import-and-Export/Importing-or-exporting-data-with-IIF-files/HOW12778.html>.

If any accounts that you specified were associated with your donation categories (or the Bank Account, or Advantage Account, if used) did not exactly match the names of QuickBooks accounts, they will be created for you, with your specified account name, but no account number. In addition, each created account may be created as a bank account, whether you intended it to be a bank or an income account! And QuickBooks does not give you any message to explain that it is doing this. You will want to check for that after your first import (or after any import using new account names) to make sure you don't need to correct anything.

Sorry, we cannot control this, it's just how QuickBooks transaction importing works!

**Important:** One common error is if you included the QuickBooks account number at the start of the Account that you matched to a donation category when you were [configuring](#) the bank deposits. That will never match properly, and will cause an account with that name (including the number), but with no account number, to be created!

Also, all accounts that have been matched to donation categories in DONATION must be Income accounts in QuickBooks (not Other Income, or any other type) or the imports will not work. Similarly, the account name you give for the Bank Account must be an actual Bank account in QuickBooks.

Although in our testing with QuickBooks 2012 Pro the matching of account names in QuickBooks is not case-sensitive (the names can vary in the use of upper and lower case between DONATION and QuickBooks), their documentation is silent on that point, and various websites for other products that integrate with QuickBooks say that the matching **is** case-sensitive. So it will be safer to use the account names in the exact same case as you have them in QuickBooks.

One slight unfortunate side effect when the names of the accounts do match is that if your accounts in QuickBooks had the optional long Descriptions filled in as well as Names, those Descriptions will actually be deleted. Unfortunately there is no way of getting around this without making you enter those Descriptions in a further field in the DONATION window for



[associating accounts with donation categories](#), which just seems like too much to ask you to enter.

Our apologies if you had descriptions on some of your accounts involved in bank deposit transactions, and they get deleted by exporting from DONATION and importing to QuickBooks Desktop.

#### Warning about Problems with Transaction Dates

Intuit's documentation for the IIF file format that we use for exporting from DONATION and importing into QuickBooks Desktop says that dates should always be in the format MM/DD/YY or MM/DD/YYYY. Unfortunately, in our experience at least sometimes if the computer running QuickBooks has a Short Date Format (as set in Windows Control Panel's Region and Language tool) with the day preceding the month (such as DD/MM/YYYY), imports of IIF files with the date in the MM/DD/YYYY format will either fail with an error message, or reverse the day and the month in the import. If you encounter this problem, and the Short Date Format on your computer running QuickBooks is something like DD/MM/YYYY, you need to set an [option](#) in **Maintenance** ⇒ **Configure Bank Deposits** to have the dates exported in the DD/MM/YYYY format instead.

#### Warning about Importing Twice

If you import the file into QuickBooks twice by mistake, you will end up with two copies of the bank deposit transaction!

QuickBooks Desktop actually has a feature in its import file format for specifying a unique ID for each transaction, and DONATION sets those unique IDs. One would hope that QuickBooks would notice if you were importing a transaction a second time with the same unique ID as a previously imported transaction, and warn you about that. But it seems that it doesn't, based on our careful testing. (The Software4Nonprofits ACCOUNTS program, by contrast, **does** notice this and warns you before importing a transaction a 2nd time.)

#### Correcting Imported Transactions

In some cases, the transaction you export from DONATION may not actually represent your entire bank deposit. (One example would be if there were amounts included in your actual bank deposit that you had chosen not to enter into DONATION, such as grants, because they aren't actual "donations", so they don't have to be there.)

In that case, just open up the imported transaction in QuickBooks and adjust it as required.



## 16 EDITING GENERAL INFO

### 16.1 Editing Organization Info

You use the following **Maintenance ⇒ Organization Info** window to edit the general information about your organization. You are always put into this window the first time you use the program, or when you create an additional new empty database (with the **Database ⇒ Switch Databases** [menu option](#)) and use it for the first time.

Enter the name and address of your organization exactly the way you would like it to appear on the receipts that will be printed.

There are two Organization Name fields, **Organization Name** and **Organization Name 2**. The second name field is intended primarily for users in Quebec, Canada, whose organizations generally have both a French and an English name. Receipts for users in Quebec (identified by picking one of two relevant options in the **Maintenance ⇒ Receipt Options** [window](#)), will have both names printed on their receipts, if they have both been filled in. All other built-in receipts include only the first Organization Name field, although you can optionally add the Organization Name 2 to [mail merge receipts](#).

Fill in the **Address** lines the way you want them to appear on your receipts. The **Phone** field doesn't automatically appear on receipts, but you can add it yourself if you wish to mail merge receipts.

The **Receipting Person** is the name and, if you wish, the office of the person who will sign the receipts when they are printed, for example "Bob Smith, Treasurer". It will be printed on the receipts, with a space for their signature. In mail merge receipts, it is the SignatoryName merge field. This field can also be edited on the **Maintenance ⇒ Receipt Options** [window](#).

The **Receipt Style / Location** field identifies your country and in some cases language or (for Australia) organization style. However, it can only be edited on this window when you are

first creating a new organization. After that, if you come back to this window with the **Maintenance** ⇒ **Organization Info** menu option, the Receipt Style / Location will be displayed but not be editable. You can edit this field through the **Maintenance** ⇒ **Receipt Options** [window](#) instead.

**Charitable #** is your organization's charitable registration number (or business number), which for Canadian organizations must be printed on the receipts. For Canadian users that's officially called a BN number. For U.S. users you may optionally enter your Tax ID / here. For Australian Deductible Gift Recipient (DGR) users, you should enter your ABN (Australian Business Number) here. For other Australian users, this number is not printed on the receipts, so it is not needed.

Once you have set the **Receipt Style / Location**, on future visits to this window the prompt for the **Charitable #** field may change, to **Tax ID / EIN** for U.S. users, or to **ABN #** for Australian DGR users.

**Note for U.S. users:** The IRS does not require you to put your Tax ID / EIN on charitable receipts. Many users do not feel that this is required, and some feel that it is a bad idea, because fake charities could steal and use this number. However, many users do wish to have this number printed on their receipts. Only fill in the Charitable # or Tax ID / EIN field on this window if you wish it to be printed on your receipts.

You cannot change the **Donation Year** on this screen - it is just displayed for your information. Change it using the **Maintenance** ⇒ **Change Year** [menu options](#).

If your organization's fiscal year is different from the calendar year, you can change the **Fiscal Year Start** month and day here as well. For instance, if your fiscal year runs from June 1 to May 31, set the month to June and the day to 1. This affects fiscal year [reporting](#). Please see [Fiscal Years in DONATION](#) to better understand this.

If you are in a country like the United Kingdom, Australia or New Zealand, that have a different tax year for receipting, and you have set the **Fiscal Year Start** month and day to something other than January 1, you can check the **Use Fiscal Year Receipting and Data Entry** checkbox to turn that on. Please carefully read [Using Fiscal Data Entry and Receipting](#) to fully understand that, and to learn when it can be turned on.

Press **Enter** or click the **OK** button on this window to save your changes. Pressing **ESC** or clicking the **Cancel** button reverts back to the unedited version of the Organization Information.

#### Note on Changing your Organization Name

The following section does not apply to users of the [Lite Version](#), which does not use license keys.

The [software licensing](#) in DONATION is by Organization Name. So, if you already have a license key for DONATION, and you change the name of your organization via the Organization Name field in this window, you will get a couple of messages saying that the new Organization Name is being written into the license key file, so that you will still be licensed for it. Please also [email us](#) to inform us of any significant changes to your Organization Name, for our records.

Users who are still in their initial evaluation period do not have or need licenses, so this is not an issue. Also, changes to the Organization Name 2 field are irrelevant to this issue - only the main Organization Name field is related to the license key.

## 16.2 Fiscal Years in DONATION

Normally, all data entry for DONATION is done on a calendar year basis, i.e. you are working on one year at a time, and donations you enter must be dated between January 1 and December 31 of that year.

The reason for this is that the vast majority of the users of DONATION are in Canada and the U.S.A., and in both countries, you claim your charitable donations for your taxes on a calendar year basis. So, if the users of the program choose to create only year-end receipts, they will include all donations during one calendar year, which can all then be claimed in one year's tax deductions.

The majority of the reports in DONATION are also normally done on a calendar-year basis, to match the receipting year.

However, for organizations whose fiscal year is different from the calendar year, there may be a need for some reporting that covers exactly the fiscal year. To accommodate this, you can specify your fiscal year start date in the **Maintenance** ⇒ **Organization Info** [window](#).

You can then use the **Reports** ⇒ **Fiscal Year** [sub-menu](#) options, and new radio buttons for fiscal year selection in the **Reports** ⇒ **Custom Reports** [window](#). You can also optionally set up to have your [pledges](#) be considered to be for the fiscal year.

**However**, for some countries such as the United Kingdom, Australia and New Zealand, the tax year and thus the receipting year is different from the calendar year. For those countries, there is a setting "Use Fiscal Year Receipting and Data Entry" that you can select in the **Maintenance** ⇒ **Organization Info** [window](#). After doing that, all data entry, receipting and reporting are done on the basis of the fiscal year you have set up. There is a whole separate Help page on that: [Fiscal Year Data Entry and Receipting](#). This Help page is only about fiscal year reporting for countries where the tax year and thus the receipting year is the same as the calendar year, like Canada and the U.S.A.

### What is considered to be the current fiscal year?

All fiscal year reports (including Custom Reports) include donations within the current fiscal year. (Some allow you to prompt for a range of dates within the current fiscal year.) If you are working on a specific calendar year in DONATION, say 2020, the fiscal year used for reporting is always "fiscal 2020". What this means is if for instance your fiscal year runs from June 1 to May 31, the "fiscal 2020" that gets reported on, is June 1, 2019, to May 31, 2020.

This is true regardless of when during 2020 you run those fiscal year reports, i.e. whether the current date is before or after June 1, 2020. As soon as you change the year to 2021 in the program (see [Changing Years in the Database](#)) the fiscal year reports will be for "fiscal 2021", namely June 1, 2020 to May 31, 2021.

If you are still working on the calendar year 2020 in the program, and it is after your fiscal year end, and you wish to see a report for the new fiscal year (fiscal 2021), just use one of the many

built-in non-fiscal year reports that prompt for a range of dates, and specify a range from your fiscal year start to December 31 (or to the current date, if you prefer). Examples of such reports are those on the **Reports** ⇒ **Donor** ⇒ **Donation Info** [sub-menu](#) and the **Reports** ⇒ **Donation** ⇒ **All Donations** [sub-menu](#). All built-in Fiscal Year have equivalent regular reports that prompt for date ranges.

## 16.3 Using Fiscal Year Data Entry and Receipting

Normally, all data entry for DONATION is done on a calendar year basis, i.e. you are working on one year at a time, and donations you enter must be dated between January 1 and December 31 of that year.

The reason for this is that the vast majority of the users of DONATION are in Canada and the U.S.A., and in both countries, you claim your charitable donations for your taxes on a calendar year basis. So, if the users of the program choose to create only year-end receipts, they will include all donations during one calendar year, which can all then be claimed in one year's tax deductions.

The majority of the reports in DONATION are also normally done on a calendar-year basis, to match the receipting year.

**However**, for some countries such as the United Kingdom, Australia and New Zealand, the tax year and thus the receipting year is different from the calendar year. For those countries, there is a setting "Use Fiscal Year Receipting and Data Entry" that you can select in the **Maintenance** ⇒ **Organization Info** [window](#). After doing that, which is only available after you also set the Fiscal Year Starts month and day on the same window, all data entry and reporting is also done on the basis of the fiscal year you have set up.

If you are not in a country where the tax and receipting year is different from the calendar year, do not set that setting! Instead, see [Fiscal Years in DONATION](#) for information about fiscal year reporting for organizations in countries like Canada and the U.S.A., where the tax and receipting year is the same as the calendar year, but still need some fiscal year reporting.

### What is considered to be the current fiscal year?

DONATION is always working on a specific calendar or fiscal year. If for instance your fiscal year runs from June 1 to May 31, the year represented in the program as "FY2015/2016" (or in some places FY15/16) means the period from June 1, 2015, to May 31, 2016. This is also more conventionally called "Fiscal 2016".

### How to Turn on Fiscal Year Data Entry and Receipting for **New** Users of the Program

If you are just starting to use the program and are in a country where this is appropriate, when you see the setup window prompting for a year, choose the correct fiscal year you want to start data entry for. Then in the Organization Info window, set your Fiscal Year Starts month and day, and check the checkbox for "Use Fiscal Year Receipting and Data Entry".

All data entry, reporting and receipting will then be done on the basis of your specified fiscal year.

If you change to a new year (whether a new later year, or an earlier year) with the **Maintenance** ⇒ **Change Year** [menu option](#), it will also be a fiscal year.

#### How to Turn on Fiscal Year Data Entry and Receipting for **Existing** Users of the Program

This option is new in version 3.77, released in January 2016. If you were in a country where this is appropriate and had previously been using DONATION, you have been working on a calendar year basis, and working around the receipting problems by creating one batch of receipts for your donors covering the first half of each calendar year (the 2nd half of a fiscal year) and another batch of receipts covering the 2nd half of each calendar year (the first half of the next fiscal year).

You can now turn on the "Use Fiscal Year Receipting and Data Entry" checkbox in the **Maintenance** ⇒ **Organization Info** [window](#) to start doing that. Suppose you are trying to do this early in 2016, to switch to working on a 2015/2016 fiscal year. You will be able to successfully check that checkbox only if **all** of the following conditions are true:

- The current year is the latest year of data in the database (in this example, that means you are switched into 2016).
- There are no donations after the fiscal year end in the current calendar year (2016).
- There are no receipts in the current calendar year (2016). If there are, and you haven't yet sent them to the donors, you could resolve this by deleting them with the **Receipt** ⇒ **Delete Range** [menu option](#).
- Any prior-year (2015) receipts that include donation dates in the current fiscal year (the 2nd part of that prior calendar year) must include only dates in that part of the year. (To put this another way, no receipts from 2015 can include donations that cross the fiscal year boundary.)
- All donations in the prior year, 2015, that are later than the current fiscal year's start date, have corresponding donors in the current year. (This can be fixed with the **Database** ⇒ **Copy Missing Donors** [menu option](#) if it turns out to be a problem.)
- Any bank deposits for prior-year (2015) donations that include donation dates in the current fiscal year (the 2nd part of that prior calendar year) must include only dates in that part of the year. (To put this another way, no bank deposits for 2015 donations can include donations that cross the fiscal year boundary.)

If you try to turn on this option and the program tells you that you can't do so because one of those conditions is violated, it will tell you which one is the problem. If there is no way to resolve that issue, you will have to wait until the next fiscal year start. At that point, change to a new year in DONATION with the **Maintenance** ⇒ **Change Year** [menu option](#), and then turn this option on.

Turning this feature on does a conversion, moving all donations, receipts and bank deposits that are in or for the fiscal year you are working on that were part of the previous working calendar year into the new working fiscal year. It will tell you how many donations, receipts and bank deposits it moved.

After this change, which dates are included in each working year in the program, and allowed for donation data entry, receipts, date ranges for reports etc. will be somewhat complex as you go back, to avoid messing things up. (Years prior to the first fiscal year you are doing the conversion for cannot also be converted, because you have already issued all of the receipts for them.)

- The date range for this year in which you do the conversion is the fiscal year (the fiscal year start in the prior calendar year up to the fiscal year end in the current calendar year, for example July 1, 2015 to June 30, 2016 for Australia). The same will apply to all later years as you continue using the database.
- The date range for the previous year (2015 in this case) is January 1 to its fiscal year end, for example to June 30, 2015 for Australia (it becomes a partial year, to accommodate the change, and some places in the program will refer to it as "2015 (Partial)").
- The date range for any years before that remains the calendar year that it always was.

The reason it's important to understand about the previous years is in case you need to go back to them to correct or reprint any prior-year receipts.

#### You Cannot Undo this Change

It's very important to understand that the program cannot undo a change to doing fiscal year receipting and data entry. The only way you could undo it would be to [restore](#) a database backup made before you made this change. That's why, if you have existing years of data, the program prompts you to make a backup before it does the conversion. You are also not allowed to change your fiscal year start date after making this change, so do be sure it is correct (and not a fiscal year **end** date) first!

#### Changed Behaviours in the Program after Making this Change

Many aspects of the program are changed after making this change:

- Data entry of donations will be allowed for dates in your current working fiscal year, both on the main window and in [One Date Batch Entry](#).
- Receipts can cover dates in the entire working fiscal year. Receipt in a fiscal year are numbered like "FY15/16-00001", for the first receipt in fiscal 2015/2016, rather than the normal numbering "2016-00001" for the first receipt in calendar 2016.
- Most reports can cover dates in the entire working fiscal year, or a part of it if they prompt for a range of dates. Some report column headers change accordingly, like to "FY15/16 Total" instead of "2016 Total". In some reports, however, there is not enough room for that, and they will just give the year number, but it will still mean a fiscal year, so 2016 really means "fiscal 2015/2016".
- The [Fiscal Year Reports](#) sub-menu is not available when you are working on a year that is a fiscal year, because it just duplicates normal reports that are also done for the fiscal year. (If you converted when you already had multiple years of data in the program, those Fiscal Year Reports will still be relevant and available for prior years.)
- [Custom Reports](#) will also be for fiscal years, and in fact the radio buttons for selecting a fiscal year will just select the normal current working year, unless you converted to this when there were prior years of data in the program, in which case they are still appropriate.
- [Bank Deposits](#) will be for donations within the current working fiscal year.
- [Importing Donations](#) with **Database** ⇒ **Import** ⇒ **Donations** will only work for donations within the current working fiscal year.

## 16.4 Editing Main Window Options

You use the **Maintenance** ⇒ **Main Window Options** window to specify some options that affect how the main data entry window works, including how it works for Limited Users who come in to the program by [using a Limited User Password](#). The window has four tabs, that



you switch between by clicking on the tab at the top. Some of the options on this window also affect other features in the program.

You can jump to the information on the 2nd through fourth tabs, lower down on this page, with the following links: [Donations](#), [Limited Users](#), and [Pledges](#).

If you enter the program with the [Donors Only Password](#), only the Donor Details tab on this window will be visible.

### **Donor Details Options Tab**

Here is the entire window, showing this tab:

### **Other 1 through 6 and Category 1 and 2 Labels**

You can change the values in the Other 1 Label through Other 6 Label fields to give new labels to the six user-customizable fields in the Donor Details area of the main window. For instance, you might change some of them to be called "Email", "Fax", and "Birthdate". (You do not have to use any or all of these fields if you do not need them.)

Similarly, you can change the Category 1 Label and Category 2 Label to give new labels to those two independent [donor category](#) lists. Again, you don't need to use those fields if you don't need them.

If you do change those labels for Category 1 and 2, all related prompts, menu options etc. will change accordingly. For instance, if you set Category 1 Label to "Membership Status", the



menu option **Maintenance** ⇒ **Donor Category 1** will instead read **Donor Membership Status (Category 1)**.

### Show Fields

There are a number of Donor Details fields that not all organizations will be interested in using. You can remove them from the display by unchecking their checkboxes in the "Show Fields" section. The checkboxes that you can use are:

- **Member/Env #:** If unchecked, removes this field from both the main window and the **File** ⇒ **One Date Batch Entry** window. Do this if you don't use Member or Envelope numbers in your organization. Also, unchecking this removes a number of reports from the **Reports menu** (that differ from other reports only in that they include the Member/Envelope #).
- **Title:** If unchecked, removes this field from the main window, and also automatically unchecks the "Include Title in Names in Letters and Receipts" checkbox described below. This Title checkbox also affects what donor fields are available in [Custom Reports](#). If you have been entering donor's Titles at the start of the First Name field and are satisfied with that approach, you will probably want to uncheck this checkbox so a separate Title field isn't displayed.
- **Middle Initial:** This field is displayed on the main window as "Mid.Init" because of space limitations. The Canada Revenue Agency requires donors' middle initials to be included with their names on receipts, so Canadian users need to either leave this checked (and also check "Include Middle Initial in donor names in receipts" on the **Maintenance** ⇒ **Receipt Options window**), or always include the middle initial at the end of the First Name field. This Middle Initial checkbox also affects what donor fields are available in [Mail-Merge Letters](#) and [Custom Reports](#). If you have been entering donor's middle initials at the end of the First Name field and are satisfied with that approach, you can uncheck this checkbox so a separate Middle Initial field isn't displayed.
- **Email Addr.:** The Email Address field.
- **Category 1** and **Category 2:** The two Donor Category drop-down fields, whose possible values are set up via the **Maintenance** ⇒ **Donor Category 1** and **Donor Category 2 menu options**.
- **Annual Pledge:** If you don't track annual or multi-year pledges from donors, uncheck this field. Unchecking this removes the **Reports** ⇒ **Pledges sub-menu** and several other places where pledges can be reported on, like [Custom Reports](#) and a Pledge Information option for [mail-merge letters](#).
- **Charitable #:** This donor field is used to track the charitable numbers of donors to your organization, which are themselves charities.
- **Comments:** This is the arbitrary-length comments field for the donor.
- **Other Info 1 through 6:** These are the six fields whose names you can specify with the Other 1 Label etc. fields, also on this window.
- **Groups:** Tracks groups or committees within your organization that this donor is a member of. You set up the list of such groups via the **Maintenance** ⇒ **Groups / Committees menu option**.
- **Customer IDs:** This one is not actually a field. Instead, checking it enables several features dealing with associating Customer IDs from third-party online donation services (such as Vanco) with your donors. Specifically, checking it enables the **IDs** button above the Donor Details panel on the main window, **Reports** ⇒ **Donor** ⇒ **Customer IDs**, and **Database** ⇒ **Import** ⇒ **Vanco Donations**. If you have stored any Customers IDs that could be displayed with that **IDs** button, you should leave this checked, and in fact, unchecking it

will be automatically reversed the next time you start the program, so that the **IDs** button is visible again.

For more details of these fields and features, see [Entering a New Donor](#).

#### Phone Number Format

Normally when you enter a phone number, if it has 10 digits (with any of various arrangements of spaces, dashes and periods, or nothing, between its parts), when you move out of the field or click **Save**, it is reformatted into the format "(nnn) nnn-nnnn", where the n's are the digits of the phone number.

If you prefer for such 10-digit numbers to be put into the format "nnn-nnn-nnnn" you can change to that option here.

Those reformattings also apply to 11-digit numbers, where the first digit is a "1". (The "1" is removed.)

Or if you prefer to not have your 10-digit phone numbers reformatted as you enter them at all, you can choose "No Reformatting" here.

Phone numbers that are 7 digits, with either no space or a period between the sections, will always be reformatted as "nnn-nnnn", regardless of your selections here.

If you have the formatting currently set to either "(nnn) nnn-nnnn" or "nnn-nnn-nnnn", and you switch it to the other one, when you click **OK** you will be given an option to convert all existing phone numbers in your database that are in the old format to the new format.

Phone numbers that do not match any of the patterns referred to above, such as ones with an extension, are never reformatted - it is up to you to format them as you wish to see them.

#### Lowest Member/Env. # for automatic assignment

This value, which must be a number greater than or equal to 1, determines the starting point for automatic assignment of envelope numbers using the **File** ⇒ **Next Higher Member/Env. #** and **File** ⇒ **Lowest Unused Member/Env. #** menu options, and the corresponding right-click or drop-down menu options on the Member/Env. # field in the [Donor Details](#) area of the main window.

It is also used as the default setting for "Starting Env. # for assignment" on the **Database** ⇒ **Reassign Envelope Numbers** [window](#).

#### Include Title in Names in Letters and Receipts

If you check this checkbox, any Title you enter for a donor will be automatically included as part of Name fields for them in all [receipts](#) and all [mail-merge](#) letters or receipts. It will also be included with donor names when [Emailing Newsletters or Everyone](#), and in the two [statement](#)-like reports, **Reports** ⇒ **Donation** ⇒ **Details, One Page per Donor** and **Category Totals, One Page per Donor**. If you do not check this checkbox, the Title will never be added in any of those places.

If you only want the Title to be added to names in some of those places, you will have to turn this checkbox on and off sometimes to get your desired results.

Also, this should be obvious, but if you always enter people's titles as part of the First Name field, rather than in the separate Title field, this checkbox will have no effect - the entire First Name, including that title, will always be used everywhere in the program that the First name is used.

### Default Address Values

Under Default Values, you can specify initial values for any or all of the Address Line 2, Address Line 3 and Postal Code fields. This would generally only be used by organizations in smaller communities, where most or all of the donors have parts of their address the same. Any of these default values that are filled in will be inserted into any new donors that you create. Of course, you can then edit them if they are not correct for any particular donor.

### Donations Options Tab

### Show Fields

The Show Fields checkboxes determine which "extra" fields are displayed in the Donation Details area of the main window. The three optional fields are Eligible Amount, Description and Description of Advantage. It is not recommended to select to display these fields unless you really need to, because unless you size your window to be fairly wide, this forces each donation to take up two lines on the screen, so you can't see very many at once!

You can only select Description of Advantage if you have also selected Eligible Amount. See [Donations and Receipts with Advantage](#) for full details about these fields. These fields are intended primarily for Canadian users, where they are required by the Canada Revenue Agency for certain types of receipts.

If you have selected to show the Description field, you can also check the checkbox for "Drop-down arrow on the Description Field, for editing the Appraiser". If that is checked, a drop-down arrow (as for a drop-down list) appears at the right of the Description field. If you click it (or if you right-click in the Description field) a popup menu appears, with an option to edit the appraiser information for this donation. To the best of our knowledge, this is only applicable to Canadian Gift in Kind donations, and only required for largish donations. As a result, you are only allowed to select this option if you have chosen a Canadian receipt style in the **Maintenance** ⇒ **Receipt Options** [window](#). (See [Gifts in Kind](#) for more details.)

#### Abundant Batch #

If you have configured to use [Abundant](#) online donations, this checkbox will appear on this window. Unlike most other settings in the program, checking this checkbox only makes a temporary change, until you either turn it off, or exit the program. Checking it and saving your changes also temporarily makes the Eligible Amount and Description of Advantage donation fields, if they are displayed, disappear from the program's main window, to allow room for the Abundant Batch # field.

The only reason for using this option would be if you are having some sort of problem with matching up the totals in [Abundant bank deposits](#), and need to check or change which donations are part of which Abundant batches.

If an Abundant donation has been assigned to the wrong donor, you may need to delete the donation from the original donor - after carefully noting its batch number - then re-enter it for the new donor, and be sure to enter the same batch number for it when you do so.

Also, if Abundant donations were assigned to the wrong donors, that almost certainly means that the two customer IDs imported from Abundant were associated with the wrong donor. Use the **IDs** button at the right of the various main-window buttons for the donor, to show the [Customer IDs](#) window. Copy out the Abundant Account ID and Abundant Customer ID (carefully noting which is which) then delete those rows from that window with the **Delete** button, and close the window. Go to the donor that those customer IDs should have been associated with, click **IDs**, and use the **New** button to add those two IDs back in for that correct donor.

#### Allow \$0.00

If you want to be able to enter Donations with an Amount of \$0.00 (which is normally not allowed), check the "Allow \$0.00" checkbox. However, you can only do this if the Description field is selected to be shown under Show Fields. This is because donations entered with an Amount of \$0 are required to have their Description field filled in.

#### Allow Negative Amounts

Although for issues like cheques that have been entered into DONATION then come back NSF we recommend just deleting that donation, some users prefer to enter a separate "donation" that has a negative Amount, to reverse the original donation. Checking the Allow Negative Amounts checkbox allows for that.

Please note that if you allow this, and the donation with the negative Amount is receiptable, it will be included on a receipt for the donor, and show up, with its negative Amount, on the table of detailed donations, if that table is included on the receipt.

Negative amounts should be entered as, for instance, -10, or -12.34, not 10- or 12.34-. (Putting the minus sign at the end will make the program think you are trying to do a calculation, and pop up the built-in [calculator](#)!)

For more details about all of these donations options, including the meaning of Eligible Amount, see [Entering New Donations](#).

### Use Batch Descriptions

This option was added in release 4.30 of DONATION. The point of Batch Descriptions is for organizations, usually churches, that do two or more [Batch Entries](#) on some days, and want to be able to report separately on them, with the **Reports** ⇒ **One Date Donation report**. If you never do that, you can uncheck this checkbox, and various features related to named separate batches will not be shown to you. This checkbox defaults to being checked the first time you use DONATION, or upgrade to release 4.30 or higher.

### Default Category

This drop-down list allows you to specify that your default donation category for new donations is something other than "General", which is what it is if you have not changed it in this window. This default can also be overridden when you are entering the One Date Batch Entry [window](#).

### Default Paid By

This field allows you to enter a default for all new donations' Cheque # / Paid By field, such as "Cheque" or "Cash" (without the quotes, of course). This applies both to donations entered via the main window and via the One Date Batch Entry [window](#). (In the latter case, a default set here will apply to donations entered in a batch, even if you choose not to display the Cheque # / Paid By field on the One Date Batch Entry window.) The reason this option is not called "Default Cheque # / Paid By", by the way, is that obviously you can't enter a default cheque number, since they would all be different! If you do frequently enter cheque numbers in the Cheque # / Paid By field, you would probably not set a default here.

### Word for "Cash"

Specifies what value you put into the Cheque # / Paid By field for cash donations. This is used to determine the total of cash donations in a [Batch Entry](#) or [Bank Deposit](#) window, so that when you use the buttons on those windows for [Counting Cash](#), the totals can be confirmed to be correct. Defaults to "Cash".

### Sort Order

These choices let you pick between Oldest to Newest (the only option in versions before version 3.22), and Newest to Oldest. Oldest to Newest means that earlier donations are higher up in the list on the main window, and the new empty donation that is automatically added is at the bottom of the list. Newest to Oldest means that later donations are higher up in the list, and the new empty donation is at the top.

### Cursor Field after F2

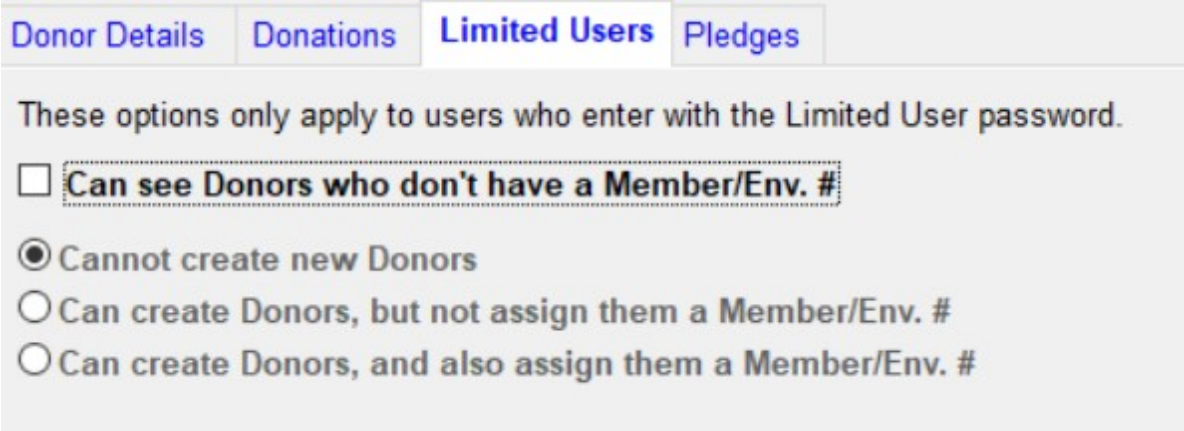
These choices let you pick between Date and Amount. This determines which donation field the cursor moves to when you press the **F2** key. (Previous versions always went to the Date field, but that could waste time if you were entering a number of donations for the same date on the main window, since once you set the date on the first donation, it would stay set.) If you do set this to Amount, however, which is useful if you often enter a number of donations for the same date on the main window, instead of using the [One Date Batch Entry](#) window, please be careful to check that the Date field, which you are skipping over, has the correct date in it!

### Show Donations

These choices let you decide how many years of donations to display on the program's main window, as you select each donor. With the choice "Only Current Year", it behaves as it always did before this choice was added, only showing donations in the current working year. With the choice "Also One Prior Year", it shows the donations in the current working year and the one just before it. And with "All Years", it shows all years of donations.

Only the donations in the current year are ever editable. Prior year donations also cannot be deleted. To edit or delete another year's donations, you must go to that year in **Maintenance** ⇒ **Change Year**.

### Options for Limited Users only



Donor Details Donations **Limited Users** Pledges

These options only apply to users who enter with the Limited User password.

☒ Can see Donors who don't have a Member/Env. #

☐ Cannot create new Donors

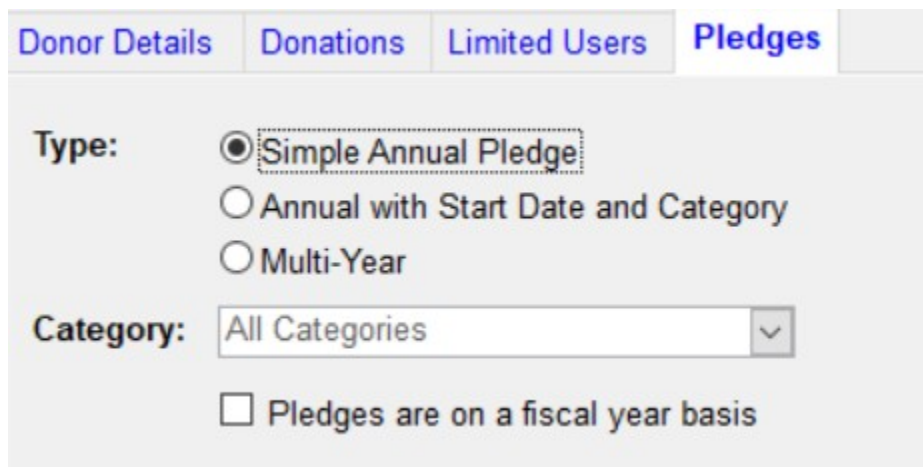
☐ Can create Donors, but not assign them a Member/Env. #

☐ Can create Donors, and also assign them a Member/Env. #

The options on this section of the screen are explained fully under [Using a Limited User Password](#), and are only relevant to users who enter the program with the Limited user password rather than the Program Entry password (or no password). However, changes to this tab (and the rest of this window) can only be made by users who enter the program with no password, or the Program Entry password.

### Options for Pledges





The screenshot shows the 'Pledges' tab in the DONATION software. Under the 'Type' heading, there are three radio button options: 'Simple Annual Pledge' (which is selected), 'Annual with Start Date and Category', and 'Multi-Year'. Below this, under the 'Category' heading, there is a dropdown menu that currently displays 'All Categories'. At the bottom of the form, there is an unchecked checkbox with the label 'Pledges are on a fiscal year basis'.

Please read [Pledges in DONATION](#) to help you understand the program's capabilities in regard to pledges.

DONATION has three methods of entering pledges, in increasing order of complexity, which you can choose between with the radio buttons on this tab:

- **Simple Annual Pledge:** This was the only option until version 3.34 of DONATION. There is an Annual Pledge field in the Donor Details area, which you enter directly. No further details about the pledge are available (such as limiting it to one donation category), so all donations made by the donor during the current year are assumed to fulfill the pledge.
- **Annual with Start Date and Category:** This is still for only tracking a single year's pledge. However, you do not enter the Annual Pledge directly in the Donor Details area. Instead, you click on the drop-down arrow that appears on that field, or right-click on the field, and then select "Edit Pledge Details" from the popup menu that appears. In the window that comes up, you can enter both a start date for the pledge (if you want to track when during the year it was made) and optionally a donation Category that the pledge is limited to. (But see below for how Categories work.)
- **Multi-Year:** This allows for the entry of multi-year pledges. Just like "Annual with Start Date and Category", you click on the drop-down arrow on the Annual Pledge field or right-click on it, then pick "Edit Pledge Details" from a popup menu, to get to a window for entering the multi-year pledge details. The Annual Pledge field's label changes to "Current Pledge" in the Donor Details area, for donors for whom you have entered a multi-year pledge.

**Category field:** This only applies with the second and third radio button options above. If you select a value other than "All Categories" here, it is the default donation category for all new pledges you will enter for all donors, using the pledge details windows. In this case, although the Category field is displayed on those pledge details windows, it is not editable - it is always set to the Category set on this tab. If you select "All Categories" here, however, you are free to select different donation categories for pledges on the pledge details window, or leave it at "All Categories" on those windows, so that all donations are considered to fulfill the pledge. If you do select a Category here or in the pledge details windows, only donations made to that Category are considered to fulfill the pledge.



If you have previously set the default Category field here to one value other than "All Categories", and then change it to another value, and there are already donors in the current year's data with pledges using the old category, you will be prompted as to whether you would like to have all of them changed to use the new default pledge category.

**Pledges are on a fiscal year basis:** If you check this checkbox, pledges are considered to be based on your fiscal year, as set in the **Maintenance** ⇒ **Organization Info** [window](#). This only applies if your fiscal year is different from the calendar year. Note: if you select the pledge type Annual with Start Date and Category, and also check this checkbox, you will receive a message informing you that Start Dates will be ignored on pledges, for example they will always be considered to be for the entire fiscal year. Also, because of the complexities it would introduce, this checkbox cannot be selected in conjunction with the pledge type Multi-Year.

Once you select this checkbox, Pledge Information mail merge [letters](#) and pledge [reports](#) are adjusted to work on a fiscal year basis. See [Pledges and Fiscal Years](#) for more information.

If you are in a country such as the United Kingdom, Australia or New Zealand, and have selected to use [Fiscal Year Data Entry and Receipting](#), then when you are working on a year that is a fiscal year the **Pledges are on a fiscal year basis** option is ignored. In this case, pledges are always on a fiscal year basis, and you **can** set a Start Date for pledges with the pledge type Annual with Start Date and Category.

When you are done making changes on all of the tabs in this window, press **Enter** or click the **OK** button to save your changes. Pressing **ESC** or clicking the **Cancel** button reverts back to the unedited version of the Main Window Options.

## 16.5 Editing Receipt Options

You use the **Maintenance** ⇒ **Receipt Options** window to specify various options that affect the output format of your charitable receipts. That brings up the following window:

**Edit Receipt Options**

Receipt Style / Location: Canada (English only) Select Logo and Signature

Starting Receipt #: 1 Seconds to Pause between Emailing Receipts: 0

☐ Email receipts, letters and statements only to yourself, for testing ☐ Bcc: to yourself

☒ Include Middle Initial in donor names in receipts

Receiving Person: Dan Cooperstock, Treasurer

**Options for Built-in Receipts Only (not mail merge)**

Skip Lines: ☐ (omits lines between sections of the receipt)

Include: ☒ Details Table ☒ Summary Table Details Table Includes: Date, Amount, and Category, plus:

☐ Cheque Number ☐ Description

Label for Member/Env. #: Envelope #

**Mail Merge Receipts and Letters**

☐ Create Receipts using mail merge instead of built-in report method

☐ Use Windows short dates for Details sections

Edit Mail Merge Receipt Edit Mail Merge Gift in Kind Receipt ☐ Edit Receipt with Advantage

☐ Use Chrome if possible to create PDFs from mail-merge documents

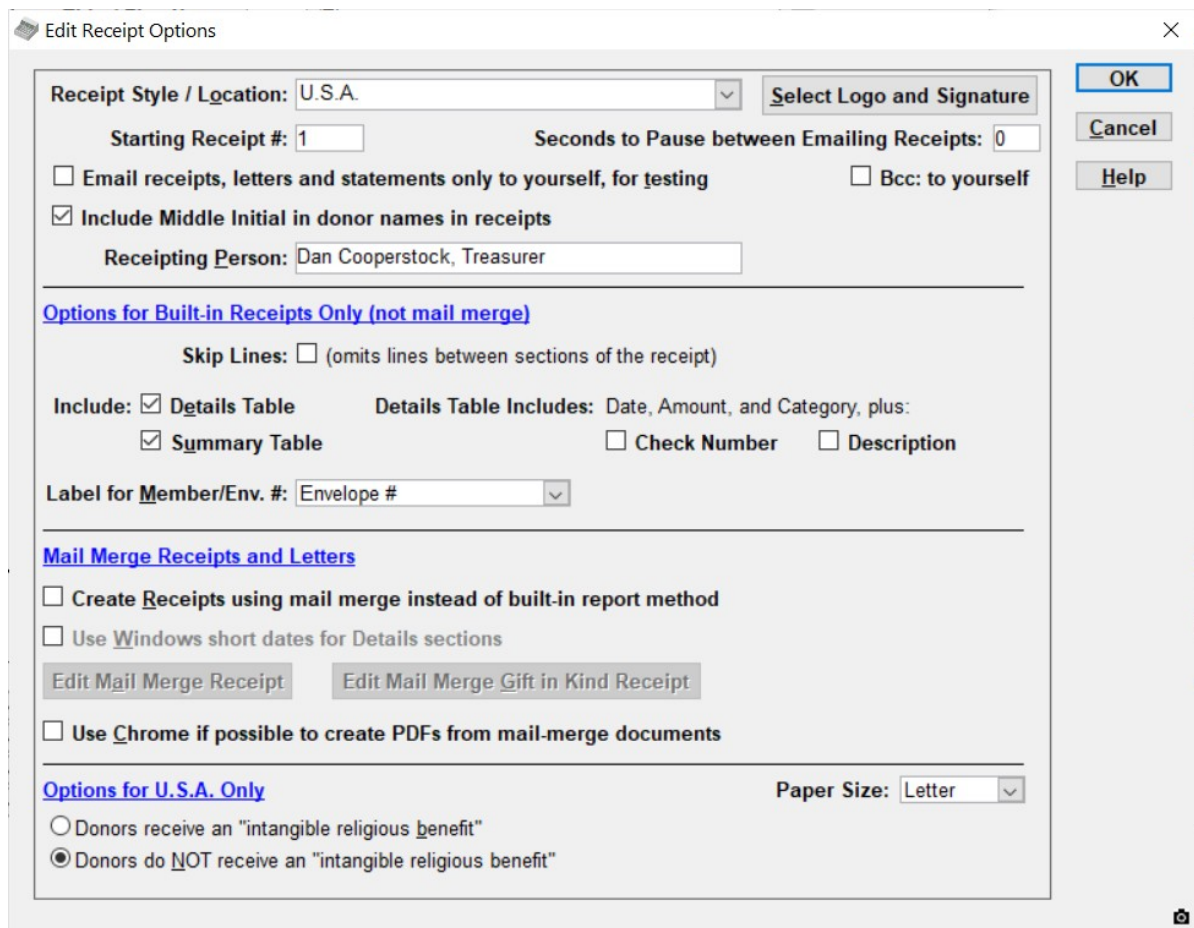
**Options for Canada Only** Paper Size: Letter

Location Issued: Toronto ON ☐ Use French Dates

☒ Use different receipts for Gifts in Kind / Non-Cash Gifts

OK Cancel Help

If you select (or have selected) the Receipt Style / Location option for the U.S.A., however, the bottom part of the window changes, and it looks like this:

The image shows a screenshot of the 'Edit Receipt Options' dialog box. The title bar says 'Edit Receipt Options' with a close button. The dialog is divided into several sections. The top section has a 'Receipt Style / Location' dropdown set to 'U.S.A.' and a 'Select Logo and Signature' button. Below this are fields for 'Starting Receipt #' (1) and 'Seconds to Pause between Emailing Receipts' (0). There are two checkboxes: 'Email receipts, letters and statements only to yourself, for testing' (unchecked) and 'Bcc: to yourself' (unchecked). A checked checkbox is 'Include Middle Initial in donor names in receipts'. Below this is a 'Receiving Person' text field containing 'Dan Cooperstock, Treasurer'. A horizontal line separates this from the 'Options for Built-in Receipts Only (not mail merge)' section. This section has a 'Skip Lines' checkbox (unchecked) with a note '(omits lines between sections of the receipt)'. Below are 'Include' checkboxes for 'Details Table' (checked) and 'Summary Table' (checked). To the right, 'Details Table Includes:' has options for 'Date, Amount, and Category, plus:' followed by 'Check Number' (unchecked) and 'Description' (unchecked). A 'Label for Member/Env. #' dropdown is set to 'Envelope #'. Another horizontal line leads to the 'Mail Merge Receipts and Letters' section. It contains 'Create Receipts using mail merge instead of built-in report method' (unchecked) and 'Use Windows short dates for Details sections' (unchecked). Below these are two buttons: 'Edit Mail Merge Receipt' and 'Edit Mail Merge Gift in Kind Receipt'. A checkbox 'Use Chrome if possible to create PDFs from mail-merge documents' is also present. A final horizontal line leads to the 'Options for U.S.A. Only' section. It has two radio buttons: 'Donors receive an "intangible religious benefit"' (unchecked) and 'Donors do NOT receive an "intangible religious benefit"' (checked). To the right of this section is a 'Paper Size' dropdown set to 'Letter'. On the right side of the dialog, there are three buttons: 'OK', 'Cancel', and 'Help'.

And if you select a Receipt Style / Location for anything other than Canada (including Quebec) or U.S.A., you get the following version:

### Receipt Style / Location

This drop-down list includes options for Canada (English Only), Quebec (bilingual French and English), Quebec (French only), U.S.A., Australia (Deductible Gift Recipient), Australia (non-DGR), New Zealand and Other.

The first time you start the program, or when creating any new database, this same field is displayed to you as part of the **Maintenance** ⇒ **Organization Info** [window](#), and you specify it there. If you need to change it after that, you do so in this window instead.

Selecting "Canada (English only)" causes the program to include the name and web address of the Canada Revenue Agency (CRA) on the receipt.

"Quebec (bilingual French & English)" is for organizations in Quebec, or national organizations in Canada that want to provide bilingual receipts. If you select it, all receipts you generate will be bilingual, and will include two copies, one for the federal and one for the provincial tax returns. It also includes the CRA's name (bilingually) and web address.

"Quebec (French only)" is for organizations in Quebec that want to provide receipts that are only in French. If you select it, all receipts you generate will have all of their headings in French, and will include two copies, one for the federal and one for the provincial tax returns. It also includes the CRA's French name and web address.

Selecting "U.S.A." causes a significantly different receipt format to be used. Among other things, the Charitable Registration Number field (called Tax ID / EIN in the U.S.A.) is optional, and is omitted from the receipts if it is not entered in **Maintenance ⇒ Organization Info**. There is no 2nd tear-off section for the donor to keep, because the receipt does not have to be submitted with your taxes. In addition, the receipt includes the required sentence "Pursuant to Internal Revenue Code requirements for substantiation of charitable contributions, no goods or services were provided in return for the Tax Deductible contributions". (But see below, in the section on [Options for U.S.A. Only](#), for further details on how this might change.)

In addition, if you select "U.S.A.", the heading "Cheque # / Paid By" for Donations on the main window and the One Date Batch Entry window changes to "Check # / Paid By", and similar spelling changes are made in various other places in the program.

Selecting "Australia (Deductible Gift Recipient)" changes the phrase "Amount of Donation" to "Amount of Gift", and adds in the phrase "All gifts over \$2 are tax deductible". It also displays the charitable number you entered on the **Maintenance ⇒ Organization Info** window with the heading "ABN Number". This is for organizations in Australia with DGR status.

Selecting "Australia (not DGR)" is for other Australian organizations. It removes the field for the charitable Registration Number, and does not add in the phrase about gifts being tax deductible. It also removes the phrase "Official Receipt for Income Tax Purposes". It does display the ABN Number, however.

Selecting "New Zealand" displays the charitable number you entered on the **Maintenance ⇒ Organization Info** window with the heading "Charities Commission Number".

Finally, selecting "Other" is for users in all other countries. The receipt generated is just like the Canadian one, with the exception that the name and web address of the CRA is omitted. Of course, if you need a different receipt format, you can switch to [Generating Receipts using Mail Merge](#), via the option below, and edit the format as desired.

For all of "Australia (Deductible Gift Recipient)", "New Zealand" and "Other", the wording on the receipt about what year this is a receipt for changes to say it is for the "tax year ending" on your fiscal year-end date if you are in a year where you have turned on [fiscal year receipting](#) and data entry.

Please note that none of these selections affect either the [currency display format or date display format](#) used by DONATION. That is controlled by Windows Control Panel's Regional and Language Options tool.

### **Select Logo and Signature**

Clicking this button takes you to a [window](#) where you can select and view your desired image files for logos and signatures for use in the built-in and mail-merge receipts and some reports and other letters.

### **Starting Receipt #**

This field, which defaults to 1, sets your starting (or minimum) receipt number for each year to the value that you enter into it. Very few organizations will need to use this, or for that matter should use this!



We are aware of two situations in which this should be used. The first is when an organization for some reason splits its receipting up between two databases, probably on two computers - perhaps for two different campaigns, though they are for the same charity. Charities should not issue duplicate receipt numbers, so one of the two systems could be set up with a Starting Receipt # of (say) 1000, assuming the other system was not expected to issue over 1,000 receipts per year. (The current maximum number of receipts per year in DONATION is 99,999, so the maximum allowed setting for Starting Receipt # was set somewhat arbitrarily at 99000.)

The other situation is when an organization starts using DONATION mid-year, and they have already issued some numbered receipts manually or with a different program. They should set the Starting Receipt # to the next number after the last one that they already issued. **Note:** in this situation, it is important that after issuing the first receipt with DONATION, with the correct starting number, you set the Starting Receipt # back to 1. Otherwise, the same starting number will apply again next year, which you do not want!

The actual receipt number given to any given receipt is the last receipt number issued by DONATION for the current year plus one, or the Starting Receipt #, whichever is larger. I.e. as soon as you have already issued receipts starting at the Starting Receipt #, it becomes irrelevant for the rest of the current year. (It is not updated as you issue receipts - it is just a minimum receipt number.)

Note: If you have multiple databases that you switch between with the **Database = Switch Databases** [menu option](#), each database has its own Starting Receipt number, which is stored with the database. (This is a change in version 3.30 - prior to that, the Starting Receipt Number applied to all databases, which could cause complications.)

### **Seconds to Pause between Emailing Receipts**

A very small number of our users have found, when [emailing receipts](#), letters or statements, that after sending two or three emails, they start getting error messages saying that emails cannot be sent. If this happens, you need to consult your Internet Service Provider that is providing the email address you are sending from. Ask them whether there is some number of seconds that you need to wait between sending, so that they don't stop you for being a suspected spammer. If they give you such a number of seconds, you can enter it here.

The default of 0 seconds, meaning no pause between sending emails, other than the time needed to generate them (which is usually a couple of seconds at least, when emailing receipts), works for almost all users.

### **Email receipts, letters and statements only to yourself, for testing**

There is an option, when you are viewing either the standard receipts or the mail-merged ones, or mail-merge letters, or [statement reports](#), to [email them](#) to donors who have email addresses. Other ways to email donors are [Emailing Newsletters or Everyone](#).

However, for all of these actions, you may want to test the sending out first, before actually emailing them to the donors. To do that, check this checkbox, then create (or [reprint](#)) your receipts, letters or statements, or do your emailing, and select the **Email/Print** button on the receipt-viewing window. All displayed receipts, letters, statements or emails for donors that have email addresses will be emailed to your [own](#) email address (as set in **Maintenance** ⇒ **Email Sending Configuration**) rather than to the donors' actual email addresses. (However,

it will say it was sent to the donor's name, to help you identify who would have gotten what if this option wasn't checked.) You can then check that everything seems correct. If so, come back and uncheck this option and then you can reprint the documents again and do the real **Email/Print** to the donors.

Normally receipts are saved back to the database only if you print them, email them to donors, or save them to PDF. (Sample receipts are never saved.) Otherwise when you exit the window viewing the receipt(s), you are told that they are not being saved because you did not take any of those actions. Emailing receipts to yourself for testing is **not** considered to be emailing them to donors, so if that is all you did, the receipts also will not be saved and the program will tell you that.

### **Bcc: to yourself**

This option is for use when you have **not** checked "Email receipts letters, and statements only to yourself for testing", and in fact, only one of these two checkboxes can be checked.

What turning on this option means is that each email sent to a donor will have a Bcc (blind copy) set to go to your own email address (as set in **Maintenance ⇒ Email Sending Configuration**), so that you will receive a copy of it in your Inbox. Since it's a blind copy, the donor will not see that fact.

The reason you may want this is that the emailing is done by an internal component within DONATION, not by your email program, so emails you send out will never appear in the Sent folder in your email program. So doing this allows you to know exactly what each donor should have received.

### **Include Middle Initial in donor names in receipts**

The Canada Revenue Agency requires receipts to include the donor's middle initial as part of their name. So most Canadian users should be sure to check the "Show Field" option for Middle Initial on the **Maintenance ⇒ Main Window Options [window](#)**, and also this checkbox. (You can't check this one without the Main Window Options one!)

If this is checked, any Middle Initial field values you enter will automatically be included as part of the Name fields in all receipts (regular or mail-merge). If it is not checked, the Middle Initials will not be added.

For Canadian users, if you choose **not** to show the Middle Initial field and check this checkbox, you need to instead enter donors' middle initials at the end of the First Name field.

Users in other countries can of course choose to use this option or not, as they wish.

Also, this should be obvious, but if you always enter people's middle initials as part of the First Name field, rather than in the separate Middle Initial field, this checkbox will have no effect - the entire First Name, including that middle initial, will always be used everywhere that the First Name is used in the program.

### **Receipting Person**

This is the name and, if you wish, the office of the person who will sign the receipts when they are printed, for example "Bob Smith, Treasurer". It will be printed on the receipts, with a space



for their signature. In mail merge receipts, it is the SignatoryName merge field. This field can also be edited on the **Maintenance ⇒ Organization Info** [window](#).

### **Options for Built-in Receipts only (not mail merge)**

The four settings in this section only apply to the standard receipts built into DONATION, which are actually created with the same technology as all of the reports. These settings are disabled if you check the **Create Receipts via mail merge instead of built-in report method** checkbox lower down on the window.

#### **Skip Lines**

Checking this checkbox causes the row of dashes (two rows of dashes in the case of Bilingual or French-only Receipts) on the receipt to be omitted. This does not apply to U.S. receipts, as they don't have a tear-off section.

#### **Include**

The **Details Table** and **Summary Table** checkboxes allow you to select which sections are included in the bottom section of the receipt. This is the part that (except for U.S. users) is to be torn off and kept by the donor. Normally (if you check both check boxes) first there is a section listing each individual donation that's included in that receipt. Following that, there is a section summarizing those same included donations, by category.

Unchecking either checkbox causes it to omit that section. Although we believe donors would generally like to receive at least one of these sections, especially when receipts include multiple donations, it is also allowable to uncheck both of these checkboxes, to omit both sections.

To make similar changes on the mail-merge version of the receipt, edit its template (as explained below) and remove one or both of the «DetailsTable:...» or «SummaryTable» fields.

#### **Details Table Includes**

These checkboxes only apply if the detailed donations section is included, i.e. if **Details Table** is checked in the previous section. Normally, if you do not check either "Cheque Number" or "Description", then the details section includes just the three fields Date, Amount, and Category, and it is in two columns on the page.

If you check the "Cheque No" checkbox, the Cheque Number / Paid By field from the donation (or "Check Number / Paid By" for U.S. receipts) is also printed in the details section, and (because this is wider) it is always just in one column on the page.

If you check the "Description" checkbox, it adds the Description from each donation into the details section of the receipt, and again causes it to always print the details in just one column on the page.

Obviously, if you check both checkboxes, both of those fields are included. Please note though that to make this fit across the page, both the Category field and the Description field have to be shorter than might be desirable. Longer values in the Description field will wrap to a 2nd line.

### **Label for Member/Env. #**

Donors who have a Member/Envelope # will normally have that number shown on their receipts. This drop-down list determines whether the field on the receipt where this is shown is labelled "Envelope #" or "Member #", or whether this number is always omitted from the receipt (if you select the option "Don't display on receipts").

This field defaults to "Envelope #" if you have not set it yourself, because most organizations that choose to enter Member/Envelope numbers for their donors are churches, who usually call it an envelope number.

Changes to this value currently affect the built-in receipts, but not the mail-merge version of the receipts described just below here. You can change the text for the name of this field in mail merge receipts yourself, by editing your receipt template(s).

### **Mail Merge Receipts**

This section of this window is for when you prefer to use the [mail-merge version of the receipts](#), whose format you can edit.

### **Create Receipts using mail merge instead of normal report method**

If you check this checkbox, receipts being created or reprinted with the **Receipt** menu options are displayed on the mail merge display/editing window, using your edited receipt format. If it is unchecked, receipts from the **Receipt** menu options are displayed with the standard built-in receipt formats (which cannot be edited, though they can be somewhat affected by the other options on this Maintenance window). The built-in receipts are created using the same technology as the reports in the program.

If you are going to use this option, you need to make sure that the standard receipt mail merge letter file is to your satisfaction, before you generate any real receipts. To do that, use the **Edit Mail Merge Receipt** button(s) described below to edit its format.

If you are going to use the mail merge receipts and edit their format, please be aware that you are entirely responsible for ensuring that the content of your receipts is in accordance with government regulations. The default sample mail merge receipt formats distributed with the program are in accordance with those regulations, but of course it is possible for you to remove or change elements that are required!

Note: when this option is checked, the settings in this window for **Skip Lines**, **Details Table**, **Summary Table**, **Details Include**, and **Label for Member/Env. #** are irrelevant, and cannot be changed, because they only apply to the built-in receipts. However, similar changes can be made in the mail-merge receipt format. The **Receipt Style / Location** selection determines which mail-merge letter file is used by default for your receipts, and the Location Issued field's entry can be included on the receipts.

### **Use Windows short dates for Details sections**

This option is mostly only intended for users in countries where the receipt should be in a language other than English or French. It only affects mail-merge receipts.

Normally the table of included donations in a receipt, or certain other type of mail-merge letter, called the Details Table, shows the donation dates in a medium-length format, things like "Dec 31, 2015" for English or "31 déc. 2015" for French. If that won't work for your language, or you just want it to only use the short date format as defined in Windows Control Panel's Regional and Language options tool, you can check this checkbox. That short date format is the same format used for date display in the program's main window's Donation Details area.

Changing this also changes the format of the DonationDateOrYr mail merge field, which displays the donation date when the receipt is only for a single donation.

### **Edit Mail Merge Receipt**

If you are using the mail merge receipts, this button is enabled, and allows you to edit their template. After clicking this, make any changes you want in the [mail merge editor](#), and be sure to save the changes.

### **Edit Mail Merge Gift in Kind Receipt**

If you are using the mail merge receipts, and you are in Canada, this button is also enabled. It allows you to edit the template for the mail-merge [gift in kind](#) receipts. After clicking this, make any changes you want in the [mail merge editor](#), and be sure to save the changes.

Note: It is also possible to edit the format of the standard and gift in kind mail merge receipts from the **Letters** ⇒ **One Letter** or **Letters** ⇒ **Mass Mailing** windows - the buttons on this window are just an easier way to get to editing them.

### **Edit Receipt with Advantage**

This checkbox is only visible for users who have selected a Receipt Style / Location for Canada. If it is checked, when you use either of the above buttons for editing a mail-merge receipt, it instead edits the template for the alternate receipt for donations with Advantage - where the Eligible Amount is entered, and it is less than the Total Amount. See [Donations and Receipts with Advantage](#) for details.

## **Options for Canada Only**

### **Location Issued**

For receipts to be issued in Canada, the location they were issued must be printed on them. This location can be entered in this field. It is ignored for receipts for all other countries. The CRA is vague about what exactly they want here, but generally the city or town and province is probably appropriate, for instance "Toronto ON". We believe the reason the CRA introduced this requirement was to distinguish which office a receipt came from when national charities do receipting from multiple regional offices.

### **Use French Dates**

If you select either Quebec option under **Receipt Style / Location**, you can also optionally check the **Use French Dates** checkbox. You actually **must** check it if you select "Quebec (French only)". When this is checked, all dates printed in the built-in receipts and in all mail-merge letters and receipts will be in French. See the section on [bilingual receipts](#) for more details.

Note: This option can be overridden in specific mail-merge letters or receipts by including the special mail-merge [fields](#) «French» or «English».

### **Use different receipts for Gifts in Kind / Non-Cash Gifts**

In Canada, there are various different data items required on a receipt for a Gift in Kind (what the CRA calls non-cash gifts), and so in order to be completely in compliance with CRA regulations, a different receipt format is needed. There used to be a checkbox on this window for whether to use such a different format, but because doing so is a CRA requirement, the checkbox was removed in version 3.83 of DONATION, and the option to do that is always turned on for Canadian users.

So for Canadian users, the **Gift in Kind Receipts** sub-menu always appears as the last option on the **Receipt** menu. The regular **Receipt** menu options only receipt for donations whose Cheque # / Paid By value is not "Gift in Kind", while the **Receipt ⇒ Gift in Kind Receipts** sub-menu options are used to create receipts for donations whose Cheque # / Paid By value is "Gift in Kind".

See [Gifts in Kind](#) for more details on all of this.

### **Options for U.S.A. Only**

There is a further selection that you must make on this window if you are in the U.S.A., about whether your donors receive an "intangible religious benefit". This may apply to churches and other tax-exempt organizations operated exclusively for religious purposes. One IRS publication explains this as: "An intangible religious benefit means a benefit that generally is not sold in a commercial transaction, such as admission to a religious ceremony."

There was a court case in late 2012, where a donor with fairly large donations to their church was audited by the IRS, and their donations ended up being disallowed as tax deductions because there was no wording on the receipt mentioning that no goods or services were provided in return for the contributions. Although the actual court judgment does not say that the wording should have included anything about intangible religious benefits being received, many commentators on the web are recommending adding such wording. You may want to consult your lawyer or accountant for advice on whether or not to do this.

So, if you are a church or other organization operated exclusively for religious purposes, and you choose to check the radio button for "Donors receive an intangible religious benefit" in the bottom section of this window (Options for the U.S.A. Only), the phrase added to the built-in receipts will change to ""Pursuant to Internal Revenue Code requirements for substantiation of charitable contributions, no goods or services other than intangible religious benefits were provided in return for the Tax Deductible contributions".

If you instead check the radio button for "Donors do NOT receive an intangible religious benefit" (definitely the correct choice for any organization that is not a church or other organization operated exclusively for religious purposes) that extra phrase in the disclaimer about "other than intangible religious benefits" will be omitted from the built-in receipts.

### **Mail Merge Receipts and Intangible Religious Benefit**

If you check the checkbox for "Create Receipts via mail merge instead of built-in report method", and the radio button for "Donors receive an intangible religious benefit", things unfortunately get a bit more complicated.

If your first installation of DONATION on your computer was version 3.48 or later, the standard mail-merge receipt template for the U.S.A. includes some "magic" that will include or exclude the desired phrase about "other than intangible religious benefits", depending on your setting of the radio buttons in this window.

However, if you have previously installed an earlier version of DONATION, you will already have a copy of the mail-merge receipt template for the U.S.A. on your computer, and any upgrade will not overwrite that with the newer version with that "magic" in it. (It would be wrong to do so, because you might have made your own changes to that template, for other reasons!) In that case, if you do want this wording to be added, just edit the template yourself, with the **Edit Mail Merge Receipt** button on this window, and add it in, and save it.

The only complication to that approach of adding in the wording yourself comes if you are using the program for [multiple organizations](#), and some of them are churches for which you want the additional wording, but some of them are not churches, so you do not want the additional wording. In that case, first of all, you have to choose the setting in this window about intangible religious benefits separately for each organization's database. And you will want to edit the disclaimer section in the mail merge receipt template, with the **Edit Mail Merge Receipt** button on this window, to look substantially as follows:

Pursuant to Internal Revenue Code requirements for substantiation of charitable contributions, no goods or services «if:ReligiousBenefit»other than intangible religious benefits «endif»were provided in return for the Tax Deductible contributions.

See the section on [if and endif](#) in the Help topic on Mail Merge Fields if you want to fully understand this, but you don't have to understand it - it just works!

### **Paper Size Options**

All Receipt Style / Location options have a final section at the bottom of the window, with one or more options in it.

All of the versions of that section have a drop-down field for selecting Paper Size. That can be Letter or Legal, the usual choices for users in Canada or the U.S.A., or also A4 for users in any other country - the Receipt Style / Location options "Australia (Deductible Gift Recipient)", "Australia (non-DGR)", "New Zealand" and "Other".

If you change the Paper Size option and save the changes, then both built-in reports and receipts, and mail-merge letters and receipts, try to print on specified paper size.

For mail-merge letters and receipts, it is important that both your default printer, and the "novaPDF Pro v7 for DONATION" printer, be set to default to A4 page size (also called paper size) for A4 to work, if you have selected that. This is done from Windows Control Panel.

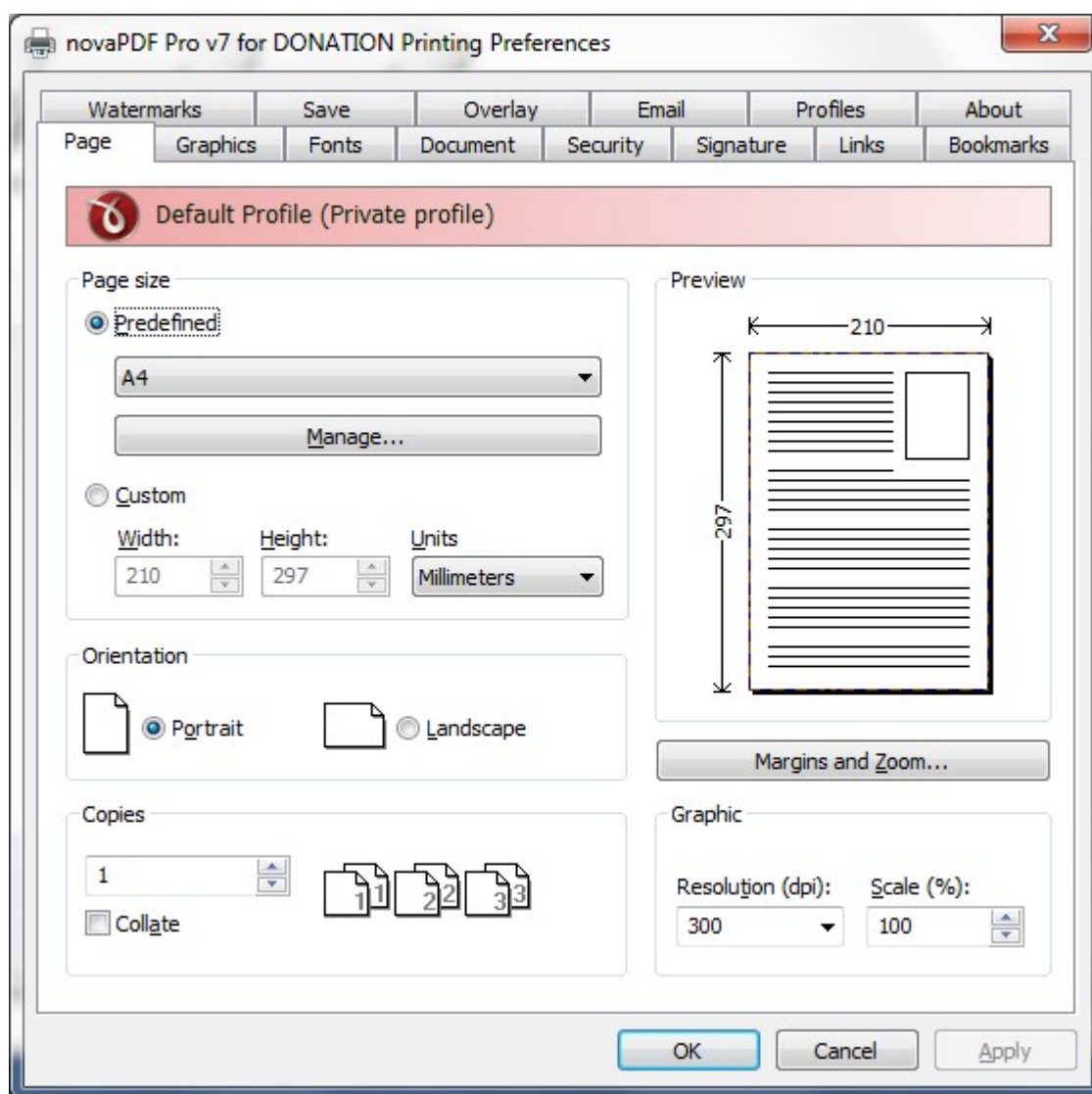
In Windows 10, you first select Devices, then Printers and Scanners, then double-click on the desired printer, then click Manage, then Printing Preferences on the left.

In Windows 7, you first select Devices and Printers from Windows Control Panel or directly from the Start menu. Then, right-click on the printer, and pick Printing Preferences from the popup menu. Other versions of Windows should have similar options.

Then find the setting in the preferences window for the page size or paper size, and be sure it is set to A4. (You may have to click between different tabs, and/or click an Advanced button, to find the setting.) If you had to change it, be sure to click OK or Save to save the change.

You will have to do these actions twice, once for your default printer, and once for the novaPDF printer. Of course, they may both already be set correctly to A4!

The appearance of that Printing Preferences window will vary, depending on your printer. Here is what it looks like for the novaPDF printer:



As you can see in this example the page size has already been set to A4.

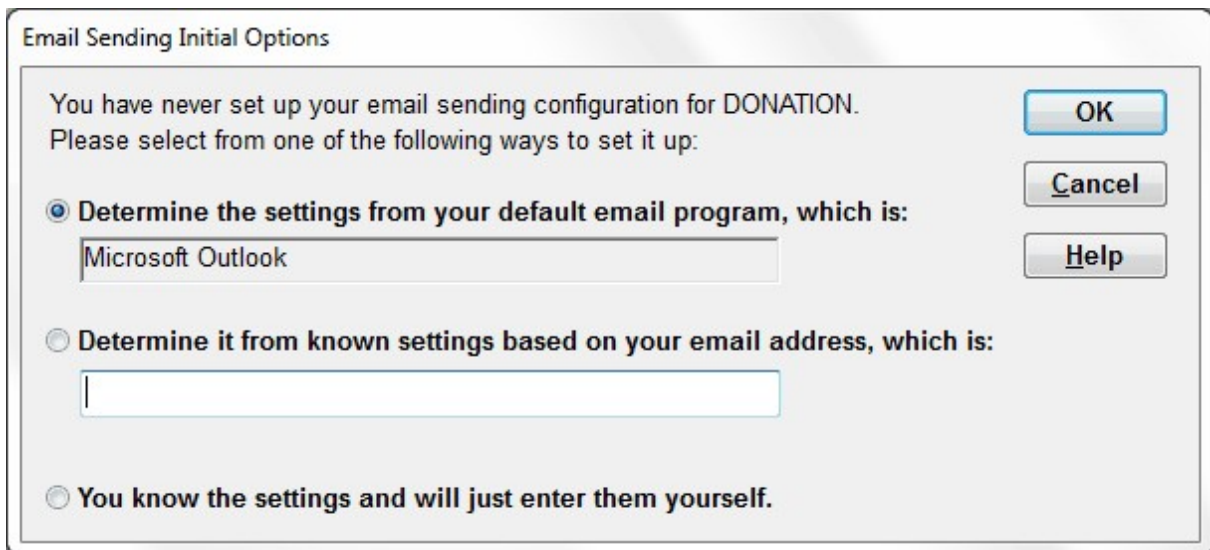


## 16.6 Configuring Email Sending

The DONATION program can be configured to send emails from various parts of the program, such as with the **Database** ⇒ **Email Backup** [menu option](#), or when you right-click on a filled-in Email Address field for a Donor and pick **Send Email** from the popup menu, or for [emailing receipts](#).

However, for those program features to work, you have to have first configured the email sending settings (also known as SMTP configuration) with **Maintenance** ⇒ **Email Sending Configuration**. (Note: Some other email sending from the program, such as for requesting a license key or an evaluation extension key, do not require this configuration, to make them easier to use.)

When you run **Maintenance** ⇒ **Email Sending Configuration** for the first time, the following window will come up:



Where it shows "Microsoft Outlook" under the first radio button above, it will show the name of your default email program, if you have one. If you **do** have a default email program (other than web mail such as Hotmail, Gmail or Yahoo Mail), from which you are able to send emails successfully, just leave that first radio button selected and click OK to proceed to the next step of the configuration. This option is the most likely to give you correct results, with the least effort on your part.

If you **don't** have an email program configured, that first radio button will be disabled and the second one will instead be preselected. The DONATION program knows what the email sending settings are for about 50 common ISPs (Internet Service Providers) and web mail solutions such as Hotmail and Gmail. To see whether yours is included in this list, just enter your email address in the field under the radio button for "Determine it from known settings ...", and click OK. If it knows how to configure your email sending based on your email address, it will go on to the next window. Otherwise, it will give you a message saying it doesn't know how to do that. (In some cases, there are multiple setup options for your ISP, and the program will offer to take you to a page on the ISP's web site to determine the correct settings. This currently applies to verizon.net and shaw.ca email addresses.)



**Note:** We also have a web page listing the most up-to-date knowledge we have of the settings that work for many common Internet Service Providers who supply email addresses, which you can see [here](#). This is the same information used in this option in this window for "Determine it from known settings ...", although the web page may be more up to date if we have learned newer information and either we haven't released an update including that information yet, or you haven't upgraded your program recently.

Your final option, if neither of those previous choices worked, is to select the third radio button, which requires you to know your own email sending settings. You may need to refer to any documentation you received from your ISP, look up the information on their web site, or contact their technical support department, to get their SMTP settings. After selecting that radio button, click OK.

After clicking OK to any of the above options, or if you have configured your email settings successfully before, the following window will come up:

The screenshot shows the 'Email Sending Options' dialog box. At the top, there are two radio buttons: 'Use Normal Server Authentication' (selected) and 'Use Gmail-Specific Authorization'. To the right are 'OK', 'Cancel', and 'Help' buttons. Below the radio buttons are several text input fields: 'From Name' (filled with 'Dan Cooperstock at Software4Nonprofits'), 'From Email' (filled with 'info@software4nonprofits.com'), 'SMTP Server' (filled with 'sfnp.nmsrv.com'), and 'Port' (a dropdown menu showing '587'). Below these is an 'Authenticate' checkbox (checked) followed by a 'With:' label. Under 'With:' are 'Username' (filled with 'postmaster@software4nonprofits.com') and 'Password' (filled with stars). Below the password field is an unchecked checkbox labeled 'Make password visible, rather than stars'. At the bottom, there are four radio buttons for 'Security': 'None', 'Try TLS', 'TLS' (selected), and 'SSL'. A 'Test' button is located at the bottom right.

This specific data has been filled in for our own business email address, but it may be empty or almost empty depending on your settings in the first window.

Note that the Password field will never actually be filled in the first time you come into this window. That's because DONATION can't read your email authentication password from any of the email programs like Outlook, because they are encrypted. **Be sure to fill this in, with the email password associated with your email address.**

The following is a quick description of each field on this window:

- **Use Normal Server Authentication or Use Gmail-Specific Authorization:** You will always pick the first option, unless you are configuring this with Gmail email address, or you are using Google Workspace (formerly called G Suite) to have your organization's domain

email addresses actually be Gmail addresses. That second case, of Gmail addresses or Google Workspace addresses on your domain, is covered more fully in the Help topic [Gmail Configuration](#).

- **From Name:** The name that should show as who the email is being sent from.
- **From Email:** The email address that the email is being sent from.
- **SMTP Server:** The name of your ISP's computer used to send emails
- **Port:** The TCP/IP port number used to send emails. The three most common settings (25, 465, and 587) are on a drop-down list, but you can also type in other settings.
- **Authenticate:** Some ISPs require you to identify yourself with a username and a password before they will let you send emails. Check this checkbox if your ISP requires authentication. If this is checked, both the Username and Password fields must be filled in.
- **Username:** If Authenticate is checked, fill in the username used for authentication. Most commonly this is your email address, but sometimes it is only the first part of your email address (the part prior to the "@" sign) and rarely it is something else entirely.
- **Password:** If Authenticate is checked, fill in the email password used for authentication. You must enter this - DONATION cannot figure it out for you!
- **Make password visible, rather than stars:** If you want to be sure you are entering your password correctly, you can check this checkbox so that you can see the password, rather than just stars or circles in the place of each character.
- **Security:** Some ISPs require some form of secure connection to be made in order to send emails. The three real options are None, TLS and SSL. (SSL is almost always associated with Port 465.) The "Try TLS" option corresponds to the settings in some email programs, and means to try using TLS security, and if that fails, use no security ("None").

Once you have the settings the way you want them, click **Test** and it will test whether the settings work, by sending you a test email. If it works, the settings will also be saved (as if you had clicked **OK**, though the window stays open). If it doesn't work, you are given an option to view a log file of the attempt, showing the error, in a window. If that happens, what you will see in that window may seem fairly "techie", but if you look over it carefully, you may be able to figure out the problem. (The most common problem is not filling in the email Password field, or not correcting it after you change that password.) Alternatively, contact your ISP for assistance with the required SMTP settings. If necessary, you can email us the contents of that log file for our advice, with the **Email to Software4Nonprofits** button on the window that is displaying it.

One small point is that if you have "Try TLS" under **Security**, when you do a **Test** it will figure out whether you do need TLS or not, and change the security setting to either None or TLS. Assuming that the test was successful, leave the changed setting the way you see it.

Once you have done a successful **Test**, click **OK** to close the window and save any further changes. You can of course also click **Cancel** if you want to abandon your changes, or **Help** to read this help page.

#### Possible Common Problems

The most common problem is always just having the wrong email password listed, including if you have changed it recently online but did not yet change it here. Please try re-entering that and clicking **Test** again before you contact us for support.

Some email services offer an optional two-step verification system (also called two-factor authentication) before you can send email, where you require both a password and something else, like a code obtained using your phone.

For **Gmail**, there are several cases, depending on whether you want to configure it with all of the settings shown in the window above, or switch to the **Use Gmail-Specific Authorization** option. All of the issues are fully explained in the [Gmail Configuration](#) page.

For **Apple** email addresses (@me.com and @icloud.com), if you have two-step verification turned on, you have to create and use what they call an app-specific password in DONATION. Details of the relevant links on their support website are [here](#).

For **Microsoft** email addresses (@hotmail.com, @hotmail.ca, @live.ca, @live.com, @msn.com, and @outlook.com), if you have two-step verification turned on (or perhaps in some cases even if you do not), you have to create and use what they call an app password in DONATION. Details of the relevant links on their support website are [here](#). Also, Microsoft email accounts allow a maximum of 300 emails sent per day, in some cases less for newer accounts or ones they do not consider to have established a good "reputation".

For other email services, they may have similar options for if you have two-step verification turned on - please let us know the details if you figure them out and we will add them here and online! Otherwise, you may not be able to configure the email sending in DONATION to work if you have this turned on, so you may have to turn it off (at least temporarily) when you wish to send emails from within DONATION.

**AOL** email addresses apparently always require you to create and use what they call an app password in DONATION. Details of the relevant links on their support website are [here](#).

**Rogers** email addresses apparently also always require a special app password - details of where to go on their support site to learn how to do this are [here](#).

**Yahoo** email addresses may also always require a special app password - details of where to go on their support site to learn how to do this are [here](#). Yahoo allows a maximum of 500 emails sent per day through your account.

#### Specific Gmail Problems

There are known issues when using Gmail, when trying to send email through it from programs like DONATION that it doesn't know about. See [Gmail Configuration](#) for an explanation and the process to resolve this, which has three variations depending on which of the radio buttons you choose at the top of the window, and whether or not two-step verification is turned on.

#### Firewall Issues if your Test Fails

One possibility if your test fails is that your firewall is blocking your outgoing access on port 25 (possibly except for your regular email program), or on whichever port you are using. If that is the problem, you will get an error message suggesting this as one possibility, and the log file it offers to show you will include lines such as any of the following:

```
socket is not ready for writing
Connect function failed.
WSAEWOULDBLOCK The socket would block.
failedWaitToConnect: Socket operation timeout.
```

If that is what you are seeing, and you have carefully checked all of the settings in the window, try temporarily disabling your firewall, and doing the Test again. If it works now, that is clearly the problem. You will then want to consult your Firewall's Help to determine how to either allow outgoing port 25 (or whichever port you are using) from all programs, or at least how to allow it from donation.exe.

Don't forget to re-enable your firewall overall after this test. It is not very safe to run a computer without a firewall these days!

#### If you have Multiple Databases

If you have multiple databases and are [switching](#) between them, it's actually possible to have different email setups for different databases. When you first try to use an email configuration in a new database, or one that you haven't specifically configured email in yet, it will start with the configuration from a previous database, but you can change it if you wish.

#### Redoing Your Configuration from Scratch

If you have configured your email settings once, but don't like the results, and want to start over from the first window above, there is a trick. (Normally, once it has been configured once, **Maintenance** ⇒ **Email Sending Configuration** takes you straight to the second window above.) The trick is to delete the contents of the **SMTP Server** field and replace it by "NONE" (without the quotes), and click **OK**. Then use **Maintenance** ⇒ **Email Sending Configuration** again, and it will take you to the first window. (If it has "NONE" in the SMTP Server, it figures you haven't configured anything successfully yet!)

## 16.7 Gmail Configuration

There are some special issues when configuring DONATION to send email through a Gmail address, or if you are using Google Workspace (formerly called G Suite) to have your organization's domain email addresses actually be Gmail addresses.

**Note:** All email addresses supplied by Telus (e.g. ones ending in @telus.net or @telusplanet.net) are now served by Gmail, so everything on this page also applies to them.

The reason there are special issues for such email addresses is because Google requires what it considers to be a higher level of security for applications other than the most common email software (like Microsoft Outlook) to send and receive emails through Gmail. Although Google refers to such applications as "insecure", in fact DONATION and most others are still very secure, using encryption to protect your password and the email contents! (Most other email services do not insist on such steps, or call other programs like this "insecure".)

If you try to configure using a Gmail address in the **Maintenance** ⇒ **Email Sending Configuration** [window](#), the recommended approach is to choose the **Use Gmail-Specific Authorization** radio button at the top of the 2nd window shown in that Help page. (This option was introduced in release #4.58 of DONATION, in August 2021.) See the details for that below.

If instead you use the **Use Normal Server Authentication** radio button, and the SMTP Server you set up there is "smtp.gmail.com" (the current correct one for Gmail), you will probably receive a large message box when you click **Test** or **OK** the first time, about there being a problem doing this. Depending on the internal details of the response received from

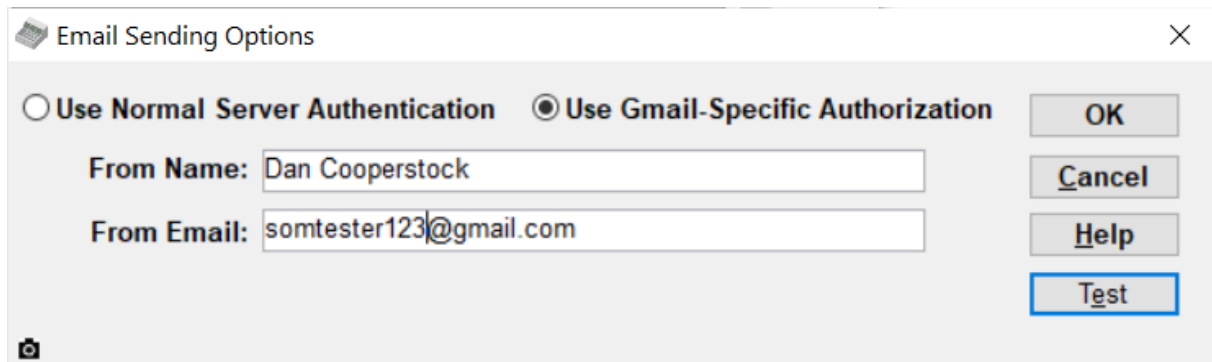
Gmail, it will either offer you an option to **Grant Access for Less Secure Apps**, or to learn about generating a special application password just for DONATION and using that password in your SMTP settings. (For many accounts, the **Grant Access for Less Secure Apps** option will no longer be available after May 30, 2022!)

This page explains all of these options.

### **Use Gmail-Specific Authorization**

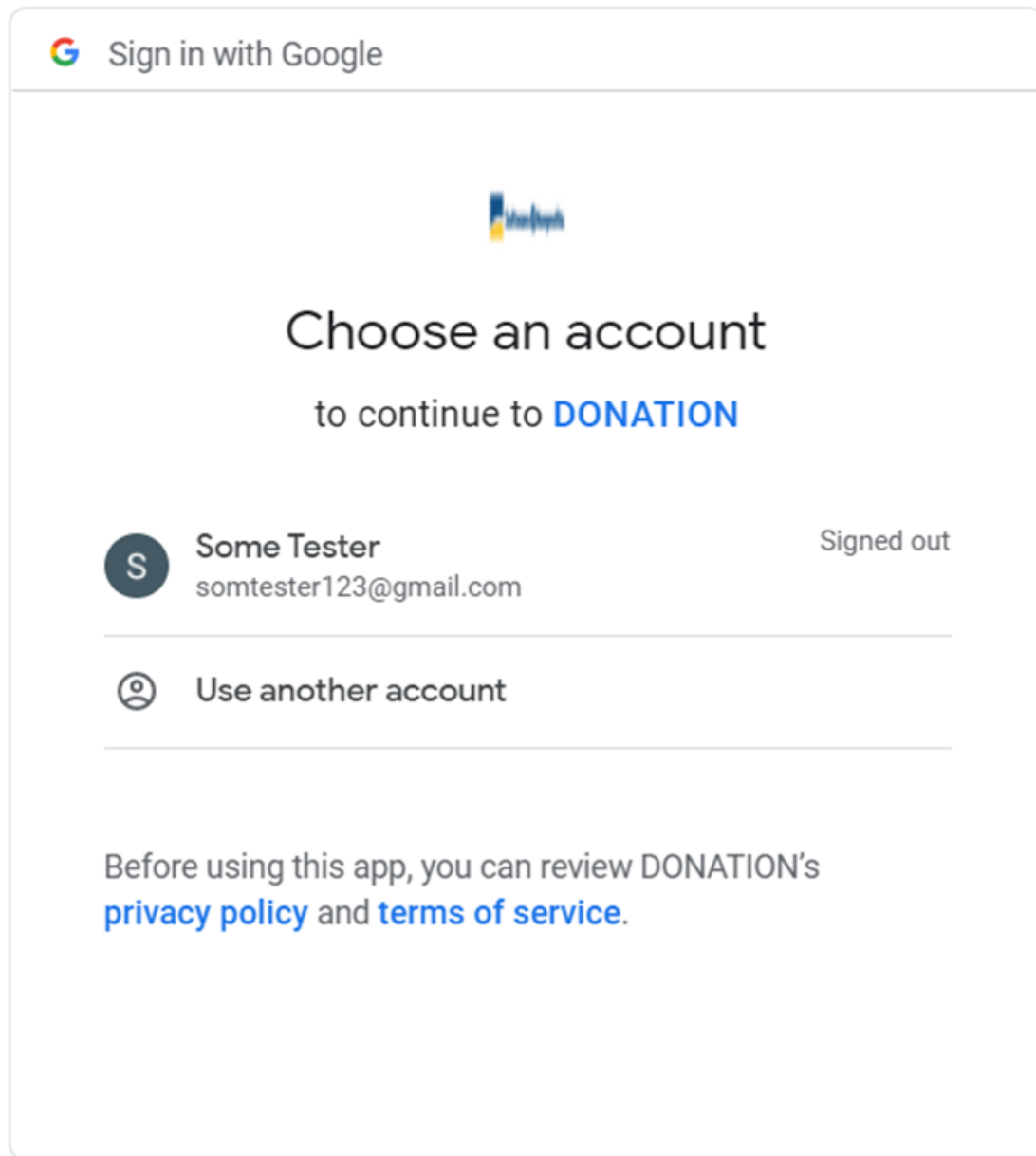
This option allows you to grant authorization only for DONATION to send emails using your Gmail account. It is arguably more secure than the option Grant Access for Less Secure Apps described below, since it only applies to DONATION. It is our recommended option for Gmail accounts.

If you click the **Use Gmail-Specific Authorization** radio button, the window changes to look as follows (using a fake email address):



Clicking **Test** will give you a message explaining what is about to happen, which is that you will be taken to a Google web page in a web browser to do the authorization, and it tells the steps you will have to follow, which are also explained here.

Unless you only have one Google account, and are already signed into it in your web browser, you will then see a web page prompting you to select the correct Google account corresponding to the email address you entered in the window above. Here's an example:



English (United States) ▼

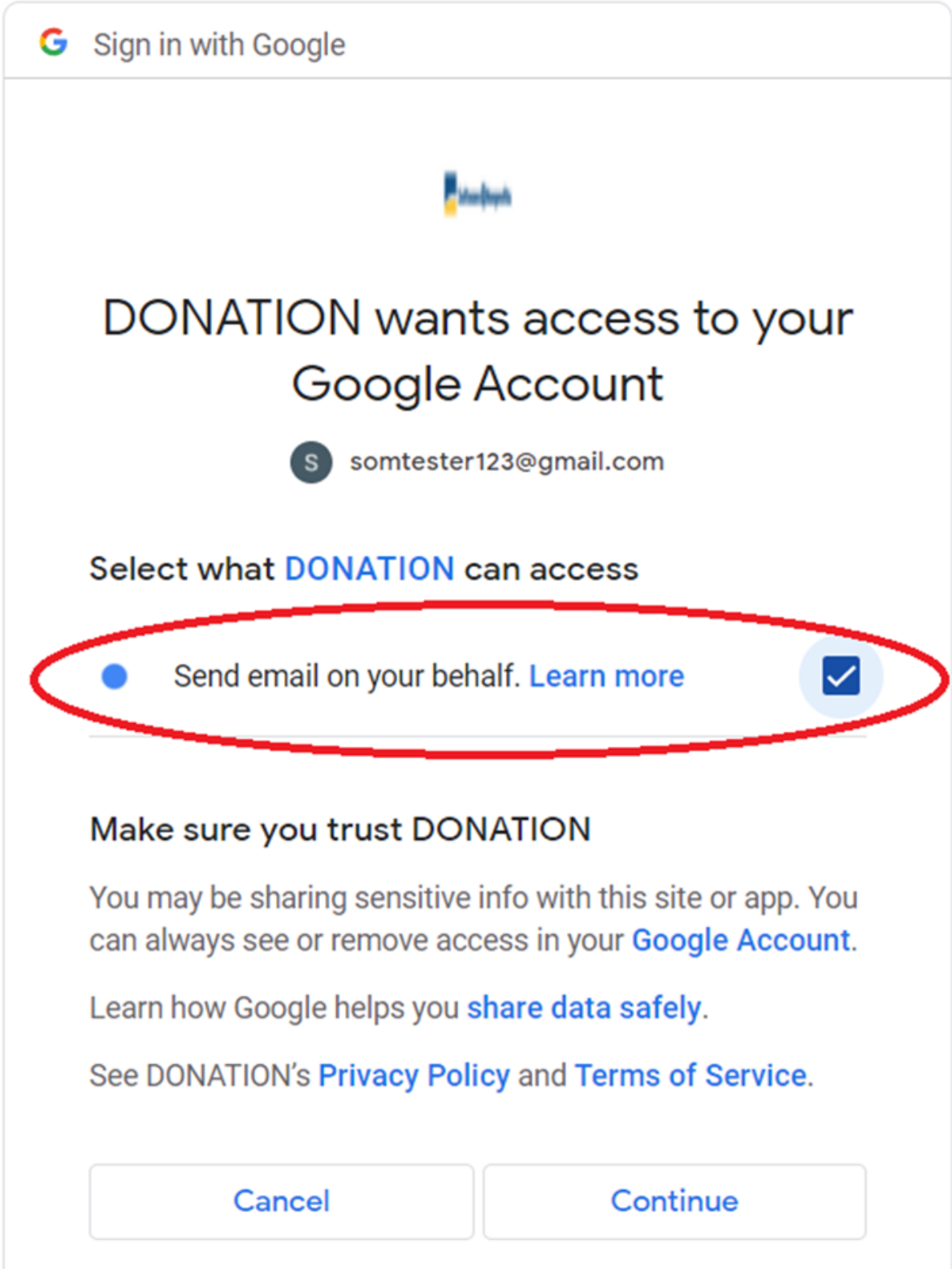
Help

Privacy


Terms

Click on the desired Google account, and enter your password for that account, if you are prompted to do so. If you have 2 step verification set on that account, you will be prompted to do that verification, for instance to enter a code that is texted to you.


Next, you will be taken to a page such as the following:



Sign in with Google



DONATION wants access to your Google Account

 somtester123@gmail.com

Select what **DONATION** can access

☒ Send email on your behalf. [Learn more](#)

Make sure you trust DONATION

You may be sharing sensitive info with this site or app. You can always see or remove access in your [Google Account](#).

Learn how Google helps you [share data safely](#).

See DONATION's [Privacy Policy](#) and [Terms of Service](#).

[Cancel](#) [Continue](#)

**Important:** You have to check the checkbox at the right in the area we have circled in red in the image above, to the right of the words "Send email on your behalf. Learn more." If you do not do that, the authorization will not be completed!



Click **Continue** after you have checked the checkbox for "Send email on your behalf". You will then see a page stating that you have granted DONATION permission to send emails via Gmail, and that you can close that web browser or tab showing that message, and return to DONATION. Do that.

Return to DONATION (by minimizing the web browser if you didn't close it, or selecting DONATION on the Windows Taskbar). The test email will also have been sent, to the same email address you are configuring, so you can check that you received it.

This is a one-time set up. Once it has been authorized, emailing using this email account should just keep working in DONATION.

If you ever change your Gmail password, the authorization you have granted will be invalidated, and you will have to re-do it.

There is also an option to revoke the permission for DONATION to send emails on your behalf, in the Security settings in your Google account. If you do that, you would also have to re-do this authorization, or use one of the other methods in the rest of this page.

You can click **OK** in the window above to close it, once you have successfully completed your test.

#### Possible Problem with this Process

If you fail to complete any of the steps above - choosing your account, logging in to it if required, checking the required checkbox, and clicking **Continue** - you will get one or more informative messages.

If the authorization process is not completed within 60 seconds, it will "time out" in DONATION, and you will have to try it again.

#### Technical Details about Gmail Authorization

The authorization process retrieves a complex string of characters, called a token, and stores it in your database so that it can be used again without needing to ask you for your Gmail password. The token expires after an hour and after that, it gets automatically refreshed by the program the next time you try to email with DONATION.

This way of sending emails using your Gmail account is done following what is called the Open Authentication protocol version 2 standard, also called OAuth2.

#### **Options when you Choose "Use Normal Server Authentication"**

##### **Two-Step Verification**

Which of the options are available when you choose **Use Normal Server Authentication** depends entirely on whether or not you have enabled what is called "2-Step Verification" in your Google Security settings for the Gmail account you are using.

Turning on that setting means that every time you log into your Gmail, you will be sent a code, to either a specified cell phone or perhaps a different email address. You then have to enter that code, before you can access Gmail. (If you have an Android phone, the verification may only require answering Yes to a popup on your phone, rather than using a code.)

If you have multiple users of the same Gmail account, you will probably not want to turn on 2-step verification, because they would probably not all have access to the same cell phone or alternate email address to receive those codes, and so this option would not work for them!

Otherwise, while 2-step verification causes some inconvenience, it also improves the security of your Google account.

When 2-step verification is on, only the 2nd option below, using an [Application Password](#), is available. When it is off, only the first option right below this is available. If you have successfully configured your email sending from DONATION using one of the methods below, and then you change whether or not you are using 2-step verification, your current email sending setup will stop working and you will have to configure it using the other method.

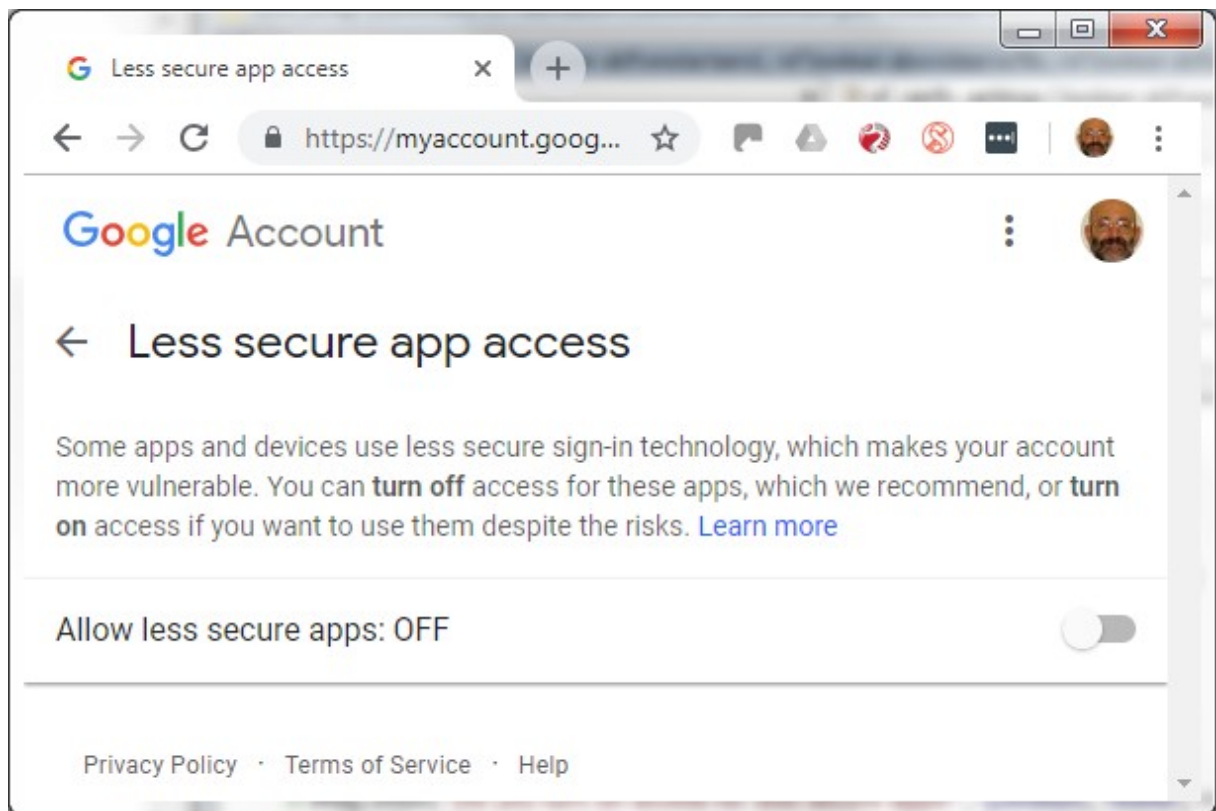
#### Grant Access for Less Secure Apps

According to [this Google web page](#), the Less Secure Apps option was no longer available to most accounts after May 30, 2022. So you will have to use the Gmail-Specific Authorization described above (our recommendation), or an Application Password described below.

This option (as long as it is still available) grants access to your Gmail account, as long as you supply the correct username (your email address) and password, to all applications that Gmail considers to be insufficiently secure, including DONATION.

**Note:** As mentioned above, this option is not available if you have what is called "2-Step Verification" turned on, or after May 30, 2022. See the [next section](#) (on Generating an Application Password) for what to do if that is the case.

Choosing to grant access for less secure apps from the prompts that come up will take you to a page in a web browser. If you aren't currently logged in to Gmail (or another Google service with the same account), it will first take you to a page where you can log in to the desired account. After doing that, you should end up on a page such as the following:



If you click the slider shown towards the bottom right of the image above, it will immediately turn that on. You can then close that window.

Google will likely then immediately send you an email with the Subject "Critical security alert", to confirm that it was you making that change. It may ask you to click a button and go to a security web page to confirm that it was you making that change. You should get that email, and if it says it is required, click that button, and answer **Yes** on the web page that comes up, before sending email will work.

Back in DONATION after doing that, you can follow the prompts to try emailing again, and it should work. If it doesn't, please double-check that you have entered the correct Gmail password in the Password field in the configuration window (click "Make password visible, rather than stars" below that field, to make sure you can see it).

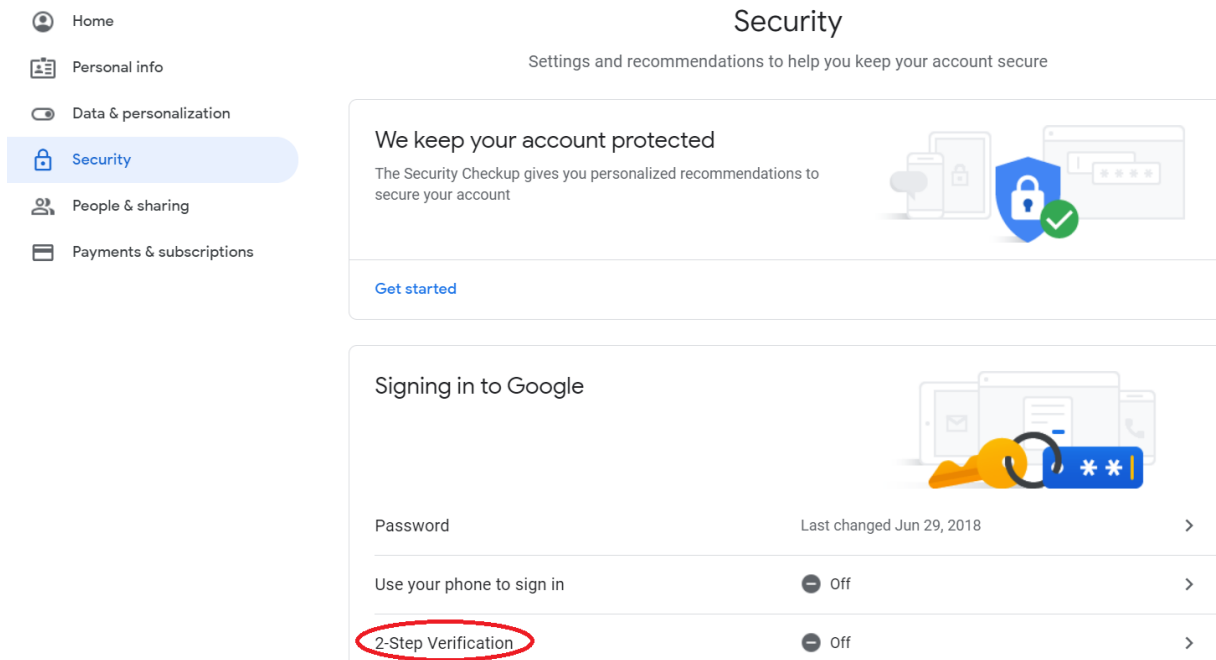
#### Generating an Application Password

This way of resolving Gmail sending problems allows you to generate a separate password only for use for DONATION, if you have chosen **Use Normal Server Authentication**.

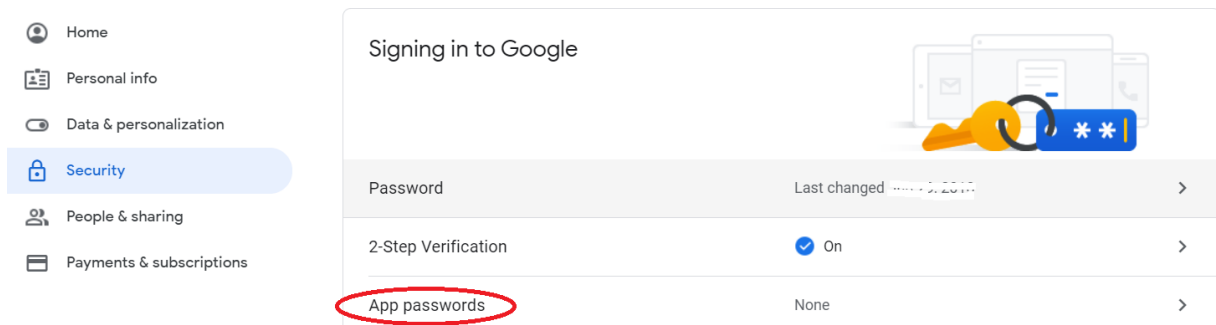
**Note:** This method is only available to users who have turned on "2-Step Verification", as explained above.

To generate an application password for DONATION, you need to log in to your Google account, open your account management page and then navigate to the Security page. The link is: <https://myaccount.google.com/security>.

If you have not turned on the "2-Step Verification" feature yet, you need to first turn it on there, with a link in the "Signing in to Google" section, as follows:



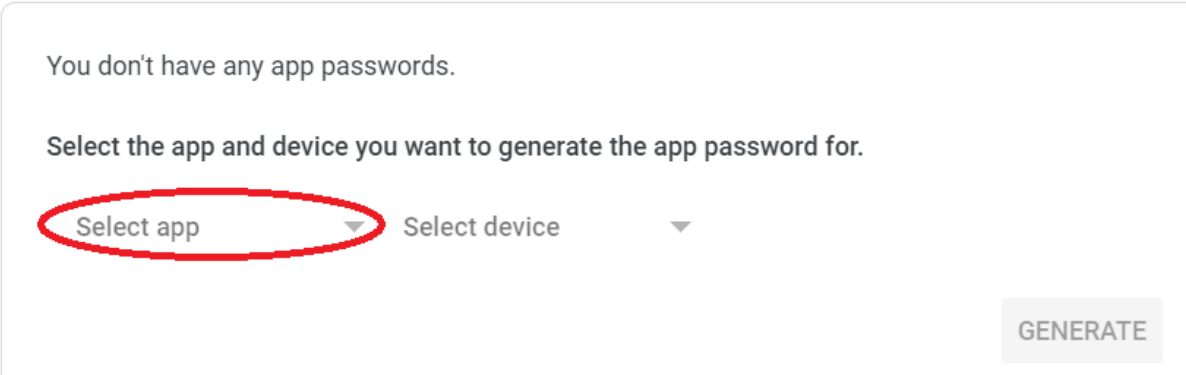
After that setting is done, you will see the "App passwords" option in your Security page, under the same "Signing in to Google" section, as follows:



Click on "App passwords" to enter the page for that. You may need to type in your password again before you get to that page. You will then see the following:

## ← App passwords

App passwords let you sign in to your Google Account from apps on devices that don't support 2-Step Verification. You'll only need to enter it once so you don't need to remember it. [Learn more](#)



You don't have any app passwords.

Select the app and device you want to generate the app password for.

Select app ▼ Select device ▼

GENERATE

Choose "Other (Custom name)" in the "Select app" drop-down list box, then enter "DONATION" as the application name. After clicking the "Generate" button, Google will generate and show the password.

The password it shows you appears to be four 4-character sections, but there are no actual spaces between the sections! If you copy it out of the window where it is displayed, by highlighting it with your mouse and pressing **Ctrl+C** (or right-clicking and picking **Copy** from the popup menu) it will be all one 16-character password.

Store that password somewhere secure (as well as in DONATION!), because Google will only show it on this page this first time. If you don't record it, you won't be able to see it from any page.

Once you have the password, paste it into the Password field on your Email Sending Options window, and use the **Test** button to confirm that it is working. That is all you need to do. You will not be prompted with 2-step verification when you send emails from DONATION.

If you have both of Software4Nonprofits' programs, DONATION and DONATION, you can actually use the same application password for both of them. It doesn't matter what name you gave in the window above.

There's also a Google help page at <https://support.google.com/accounts/answer/185833?hl=en> explaining application passwords in more detail.

## 16.8 Registering Online

It is recommended that all users of DONATION register, to get onto the mailing list. It is actually required that you do this for Software4Nonprofits to be able to process any payment you make for the program, or give you an evaluation extension request, or a license key.

If you have not yet registered (or informed the program that you have done so) a window will come up whenever you start the program, informing you of the benefits of registration, and

asking you about registering. It gives you three options: going on to register (as shown below), informing the program that you already registered online or from another computer, or skipping that and being asked about it the next time you start DONATION.

There are two ways to register. Many OnDemand users will already have registered using the registration form on the web site. If you haven't done that, however, you can also register using the **Tools** ⇒ **Register Online** menu option in the program.

When you select **Tools** ⇒ **Register Online**, or are sent to this window from the window asking you whether you have registered (if you click **Register Now** in that window), a window such as the following will come up:

**Submit Registration Information**

**Registration Information for Submission to Software4Nonprofits.com**

By registering, you agree to be added to the mailing list, to which Cooperstock Software sends occasional emails with news about DONATION, including announcements of new versions.

**Organization Information**

Name: Your Organization

Phone #: 123-456-7890

Address Line 1: 100 Main St.

Address Line 2: Anytown ON

Address Line 3:

Web Site / URL:

**Contact Person**

Your Name: Dan Cooperstock

Email Address: info@software4nonprofits.com

Phone #: 416-423-7722

Your Position: Treasurer

**Other Comments**

How did you hear about DONATION? I heard it through the grapevine

Any other comments? This is a wonderful program

**Buttons:** Submit, Cancel, Help

Some of the field values are initially filled from the information in the **Maintenance** ⇒ **Organization Info** [window](#). If you have previously used **Maintenance** ⇒ **Email Sending Configuration** to [configure email](#), the email address for this window will be taken from that configuration.

You can fill in or edit all of the fields, as desired. If you do this registration multiple times on the same computer, your previous entries for those fields will be displayed. However, there is normally no need to register multiple times, unless your contact information changes.

The one slight exception to what is said above is that the Your Name field will be taken from the Receipting Person field on the Organization Info window, but you might want to edit it for registration purposes. Any change you make in this field will not change the Receipting Person.

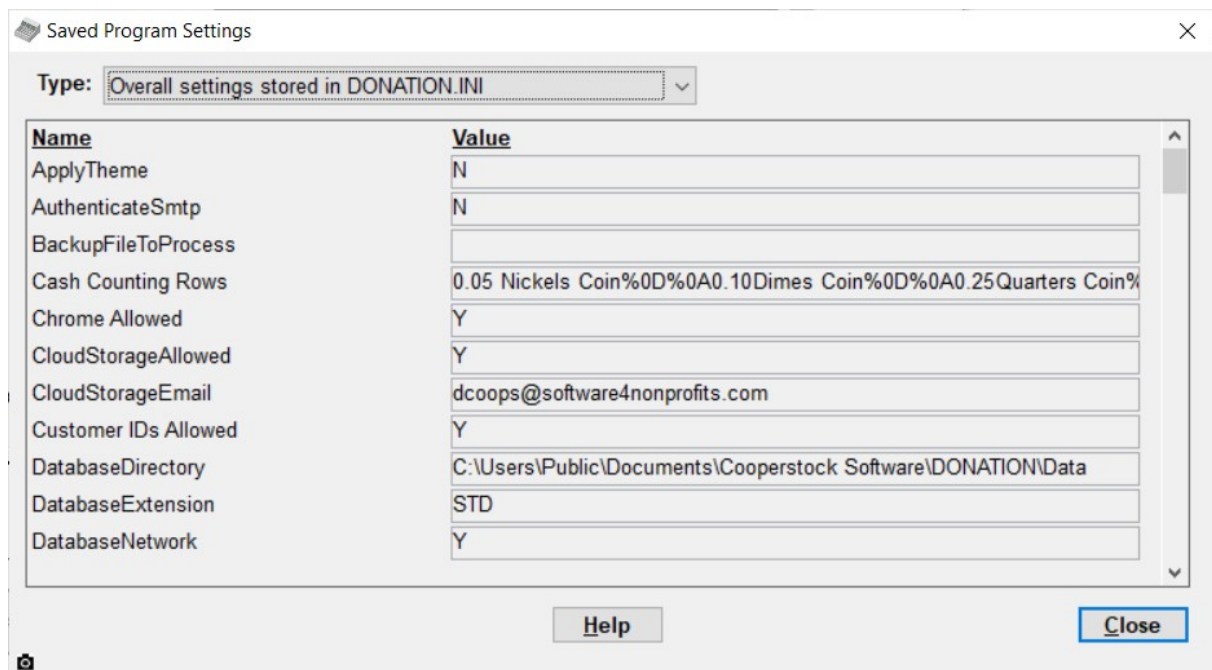
After filling in all desired fields, click **Submit**. That will bring up a web page showing that your registration was successful. Clicking **Submit** on this window will also close this window.

Within a reasonable period of time (usually much less than one day), you should receive an email acknowledgement of your registration back from Software4Nonprofits. In the case of a first registration for the OnDemand version, your login information will be sent shortly afterwards.

## 16.9 Viewing Saved Settings

The program stores a large number of settings in various places. This includes settings that you are aware of setting (like ones from the **Maintenance** ⇒ **Main Window Options** [menu option](#)) and ones that you don't set explicitly, but the program still needs to store (like the previous position and size of the main window, for use the next time you run the program).

You can view all of these stored settings, if you are interested (or Software4Nonprofits asks you to do so to help resolve a technical problem), with the **Tools** ⇒ **View Saved Settings** menu option. That brings up the following window:



Note that while you can view all saved settings here, you cannot edit them with this window. That must be done with the normal features of the program.

You can choose between the following types of settings to view, via the **Type** drop-down list at the top of the window:



**Overall Settings stored in DONATION.INI:** The DONATION.INI file is in the program's [Data Directory](#). These overall settings apply to all users that use the program on this computer (for example if multiple Windows users log in and use it). Some of the settings, like the DatabaseDirectory setting shown above, also apply to all databases that you have on this computer, for example if you use the **Database** ⇒ **Switch Databases** [menu option](#) to create and switch between multiple databases for multiple organizations.

**Current Database settings stored in the Database:** These settings are stored in your database, and thus travel with it if you backup the database on one computer, and restore it on another computer. Also, if you [switch databases](#), there are copies of each of these settings for each database. (This is an improvement, starting in version 3.30, because in previous versions, you would have had to set these same settings individually on any new computer you transferred DONATION to, and they would have applied to all databases.)

**Current Database settings stored in DONATION.INI:** These settings are related to your current database, but stored in this computer's DONATION.INI file like the Overall Settings. If you [switch databases](#), there are distinct copies of each of these settings for each database. However, because they are not stored in the database, they do not travel with database backups, like the ones in the previous section. (These are settings that were judged to be potentially specific to each computer.)

**Current User settings stored in the Windows Registry:** In the unusual case where you have multiple Windows users running DONATION on the same computer (at different times obviously), some settings might be personal to each user. Those settings are in this group, and are stored in the current user's area in the standard Windows Registry, under the key "HKEY\_CURRENT\_USER\Software\Dan Cooperstock\DONATION".

#### Settings stored in the Database for Simultaneous Multi-User Versions

There are some special considerations for users of the [Local Network Version](#), and the 5 simultaneous user [OnDemand Version](#), about the current database settings stored in the database. The issue comes up when two or more people are running those programs simultaneously (at exactly the same time).

For efficiency's sake, starting in release 4.10 of the program most such settings are now only read by the program once, when they are first needed, and thus if another user changes a setting that is relevant to something you are doing, you will not be aware of it, unless you exit the program and re-start it. Previously, some of those settings would be read by the program each time they were needed, in case another user changed them, which could slow things down. We have carefully reviewed all of the settings, and have changed a few of them to be the way they were before - re-read from the database every time they are needed - if they are ones where it really seems important to immediately see another user's changes.

## 17 USING REPORTS

### 17.1 Viewing and Printing Reports

When you generate any report from the **Reports** menu, or built-in (but not mail merge) receipts from the **Receipt** menu, they will show up on a Reports window for previewing. You can scroll through the report with the scroll bar, or by using the **First Page**, **Previous Page**, **Next Page** and **Last Page** VCR-style toolbar buttons.

Send the report to your printer with the **Print** button (or **Ctrl+P** or **Alt+P**). To choose another printer or set printer options (such as double-sided printing if available) use the **Print Setup** button. (This accesses the same option as the **File** ⇒ **Print Setup** menu on the main window.)

When you print normal reports or sample receipts (but not real receipts), you will be shown a standard Print dialog box that allows you to do things such as select a printer, or select a range of pages or a number of copies. The Print dialog box is not shown for real receipts, because it is important to print all of them if you have generated them. You need to send them to your donors, and you would not want to accidentally fail to send out some of them because you didn't print them all.

Exit the reports window by closing it with the normal "X" close button on the top right-hand corner, or by using the **Close** button or pressing **ESC**.

The reports window is resizable, by dragging its edges, and it memorizes the position and with the size you set it to, restoring that the next time you use it. The very first time you use this window, it will be maximized - you can resize it by first clicking the Maximize button at the top right of the window's title bar to un-maximize it.

Most reports are displayed in print preview mode, which is indicated by a thin blue border around the body of the report. If that ever seems to be sized incorrectly, check in the details of your **Print Setup** for your printer that you haven't chosen an unusual page size.

#### Page Size and Orientation for Reports

All reports are designed to normally print on Letter size paper (8 1/2" x 11"). They will also work on Legal paper (8 1/2" x 14") if you have a printer that supports that.

Please see the [section](#) on "Paper Size Options" in the Receipt Options page for details on how to ensure that your reports, receipts, and mail-merge documents print successfully on your desired size of paper, including A4 if that is an issue in your country.

Each report is designed to print in one of portrait or landscape mode. You cannot change the orientation of the report, except for [Custom Reports](#) that you design.

#### Buttons on the Report Viewing Window

The following are the other buttons for things you can do on the Reports window:

<u>Button</u>	<u>Action</u>
---------------	---------------

<b>Filter</b>	<a href="#">Filtering Reports</a>
<b>Sort</b>	<a href="#">Sorting Reports</a>
<b>Save As</b>	<a href="#">Saving Reports to Files</a>
<b>Email/Print</b>	<a href="#">Emailing Receipts and Statement Reports</a>
<b>Save PDF</b>	<a href="#">Saving Reports, Receipts and Letters as PDF Files</a>
<b>Memorize</b>	<a href="#">Memorizing Reports</a>
<b>Save SQL</b>	<a href="#">Loading and Saving SQL for Reports</a>
<b>Load SQL</b>	<a href="#">Loading and Saving SQL for Reports</a>
<b>Rerun</b>	For reports that prompt for values, such as a range of dates, prompts again and redisplay the report with the new values. Not visible for reports that do not prompt for values.

For details of individual reports, see [The Reports Menu](#).

#### Drill-Down in Reports

Many reports that include summary donation totals by donor have drill-down capabilities. Values in those reports that you can drill-down into are shown in blue, to indicate that you can click on them. (Don't worry, they switch back to being shown in black if you Print them, save them to PDF, or export them with Save As!)

Clicking on those fields shows a detail report of the donations included in the displayed total for the donor whose total you clicked on. A **Back** button at the top-left corner of the detail report takes you back to the original report.

See Also: [Creating Custom Reports](#)

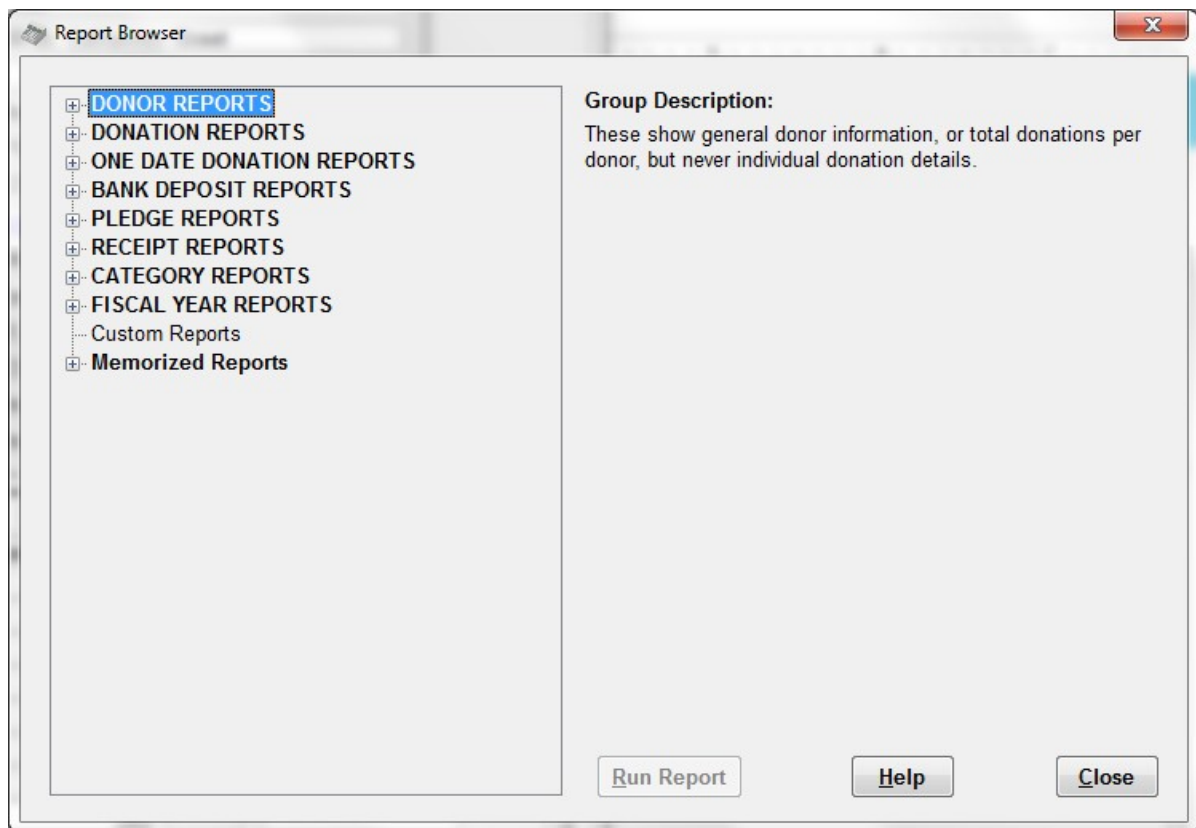
## 17.2 Using the Reports Browser

There are two ways to select the built-in reports, [Custom Reports](#) and [Memorized Reports](#) in DONATION:

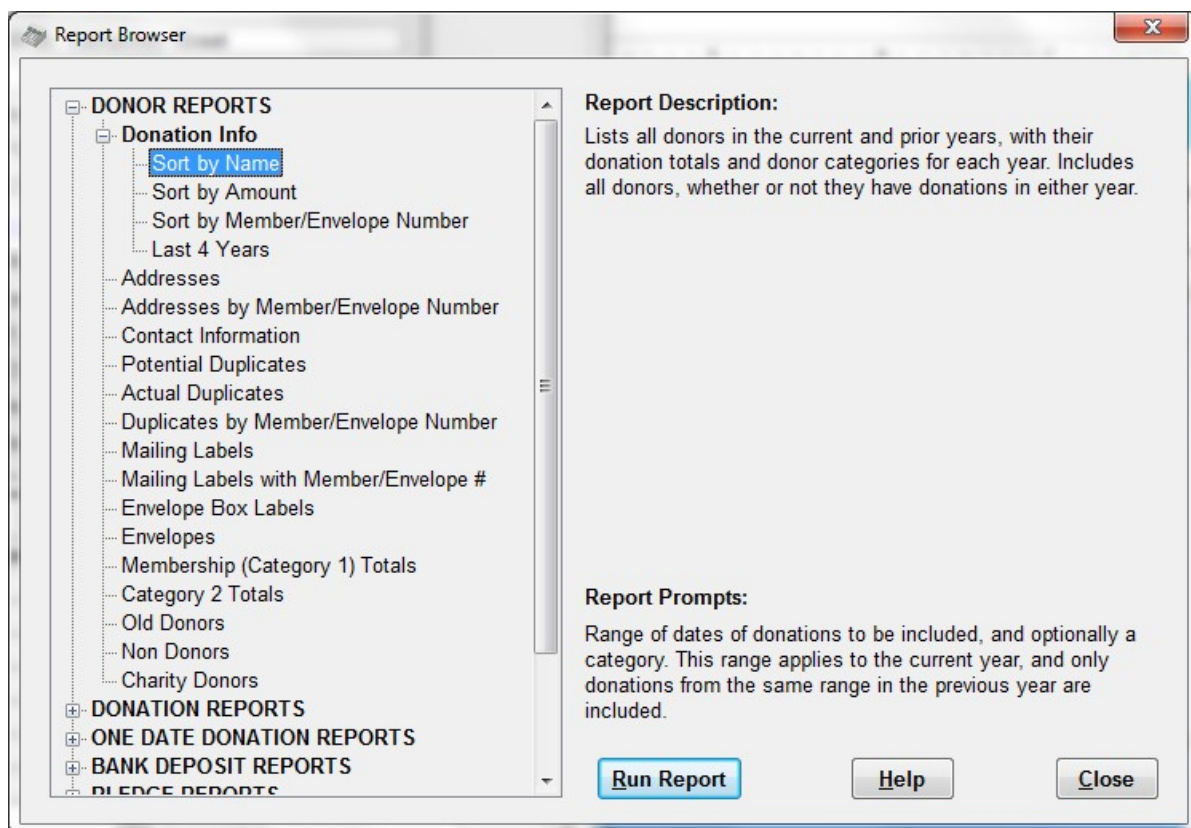
- with the Report Browser, that allows you to select from a tree of reports, and see descriptions for them before you run them, or
- with the various sub-menus and menu options of the **Reports** menu.

Both of these ways include all of the same reports. The Report Browser is better for learning which reports are available, and what they do, whereas the sub-menus are better for quickly selecting a report when you already know which one you want.

Use **Reports** ⇒ **Report Browser** to see the Report Browser window. It will initially appear like this:



As you can see, the reports are listed in a tree-like view on the left, similar to trees you may have seen in Computer, My Computer or Windows Explorer. You can open up any of the groups by clicking on the plus sign to its left, double-clicking its name, or pressing the right arrow key or space bar when it is highlighted. You can then move around with the up and down arrow keys, or the mouse. Here is the same window with some of the groups opened up, and an actual report (rather than the name of a group of reports) highlighted:



Now that a report is selected, the **Run Report** button is enabled (not "greyed out"). You can run the selected report by pressing **Enter**, double-clicking the name of the report, or clicking on the **Run Report** button.

When specific reports are selected, their description is shown on the right, along with information on what data, if any, that report prompts for before displaying the report. (For instance, a range of dates.) Browsing through these descriptions allows you to get a good idea of the range of reports available in DONATION, and what they all do, and to find a report that does what you need.

Selecting "Custom Reports" and clicking **Run Report** just brings up the Custom Reports [window](#), on which you can design a new custom report.

The list under "Memorized Reports" is the same as the list in the **Reports ⇒ Memorized Reports** [window](#). Under Report Description on the right, if the Memorized Report has been given a Description, it will be displayed, and if not, just the Name will be shown in that area. If you do not yet have any memorized reports, this section will not appear in the tree on the left.

When you are finished browsing or running reports from this window, click **Close** (or press **ESC**) and it will close. As a convenience, if you open it again with **Reports ⇒ Report Browser**, during the same run of DONATION, the tree will usually be open to exactly the same place it was open when you closed it.

Like the options on the **Reports** sub-menus, if you have selected not to show the field Member/Env. # in the Donor Details tab of **Maintenance ⇒ Main Window Options**, several reports that specifically include that field, such as "Sort by Member/Envelope #" and "Mailing

Labels with Member/Envelope #" in the example window above, will not be shown, since they are not relevant if you aren't using that field.

Various other options and settings in the program also affect which reports can be seen. For instance the Fiscal Year Reports cannot be listed or used if they are not appropriate (see the [Fiscal Reports Sub-Menu](#) page for details).

## 17.3 Filtering Reports

There is a **Filter** button on the reports viewing window. What a filter does generally is restrict the rows displayed in a report, by specifying one or more conditions (called criteria), which the rows have to satisfy to still be displayed. It cannot change the data in any row - it can only determine which of the rows in the report are displayed!

So, for instance, if you do **Reports ⇒ One Date Donation** for a given date, you can't use the **Filter** feature to view the donation details for a different date. To do that, you would have to re-run the report. Similarly, if you do **Reports ⇒ Donor ⇒ Donation Info ⇒ Sort by Name**, you can't use a filter to restrict the report to only include donations to a certain donation category, because the donation category isn't one of the fields in the report. (Fortunately, you can do that via the selection criteria when you run that report, so a filter isn't needed!)

When you change the filter, part of the header of most reports will change to reflect the new filter you have specified. Please note however that each time you create a given report, it will be displayed with no filters. In other words, filters that you previously used on a report are not remembered the next time you run that report. The exception is if you [memorize](#) a report with filters, and then re-use it - see the details on that below.

It's very important to be aware that restricting the rows displayed in a report will mean that any totals in the report change. For instance, if you put a filter on a report showing each donor's donations for a range of dates, the displayed total donations amount will then be incorrect, since it includes only the amounts from the remaining rows of the report.

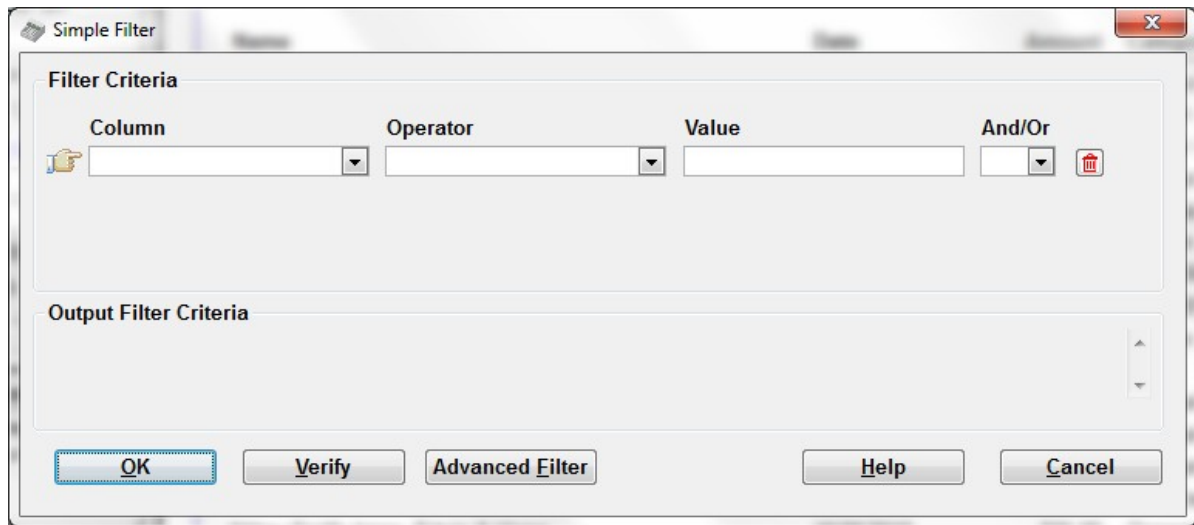
Filters can also be used for restricting data selected for [mail merging](#) with the **Letters ⇒ Mass Mailing** menu option. Although that is not exactly a report, the filtering concepts are the same. The rest of this Help topic will refer exclusively to reports, but everything applies in the same way to filtering mail merge data.

As of release 4.15 of DONATION this feature has been greatly simplified with a new Simple Filter window, described below. Prior to that only what is now called the [Advanced Filter](#) window was available. (A version of that is still available through the **Advanced Filter** button on the Simple Filter window, for those who are already comfortable using it, and for the few cases where you need complex criteria that cannot be done with a Simple Filter.)

There is a training video on Filtering Reports on the [Demos and Samples](#) web page, if you would prefer to see this feature demonstrated live, rather than reading about it.

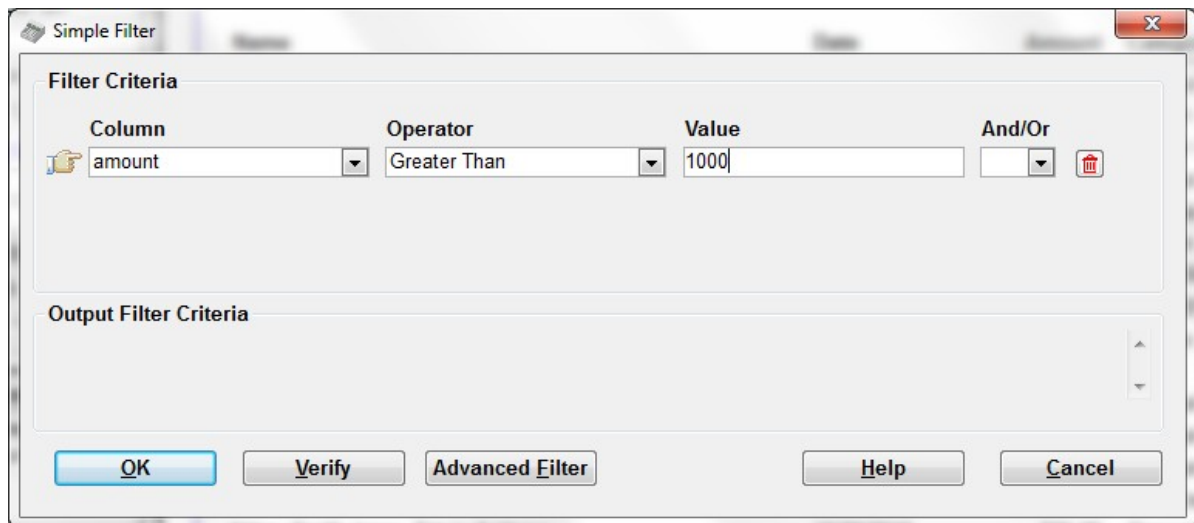
As an example of filtering, suppose you want to see only individual donations over \$1,000. You might start by running the **Reports ⇒ Donation ⇒ All Donations ⇒ Sort by Name** report. Then click the **Filter** button. (Do this as you are reading this page, so it will be easier to understand it!) The following window comes up:





The image shows a 'Simple Filter' dialog box. It has a title bar with a close button (X). Below the title bar is a section labeled 'Filter Criteria'. Inside this section are four fields: 'Column' (a dropdown menu with a hand icon), 'Operator' (a dropdown menu), 'Value' (a text input field), and 'And/Or' (a dropdown menu with a trash icon). Below the 'Filter Criteria' section is an 'Output Filter Criteria' section, which is currently empty. At the bottom of the dialog are five buttons: 'OK', 'Verify', 'Advanced Filter', 'Help', and 'Cancel'.

In this case, you want to filter on the Amount column, and the obvious guess is the column which is called "amount" in the drop-down list under the heading "Column". Select options from the first two column's drop-downs, and fill in the third column (the Value) so it looks as follows:



The image shows the 'Simple Filter' dialog box with the following values entered: 'amount' in the 'Column' dropdown, 'Greater Than' in the 'Operator' dropdown, and '1000' in the 'Value' text field. The 'And/Or' dropdown is still empty. The 'Output Filter Criteria' section remains empty. The buttons at the bottom are the same as in the previous image.

Note that for numeric values like the Amount, you don't need to enter dollar signs or commas in what you enter into the Value field. If you enter them, they will be ignored. You also don't have to enter cents.

If you like, you can click on the **Verify** button and it will tell you whether you have entered a valid filter. If that says the filter is OK, click on the **OK** button and it will apply that filter to your report. In this case, you would then only see the rows of the report where the amount is more than \$1,000.

You will also notice after you either tab out of the Value column or click **Verify**, that a text version of the filter appears in the **Output Filter Criteria** area below the entry fields. That text version is actually what is used internally by the program. It is what you would have entered to get the same result in releases of DONATION prior to release 4.15, or could enter with the **Advanced Filter** button. For the case above, what you would see there would be:



(amount > 1000)

### **The Column Drop Down**

The first column, called "Column", is a drop-down list of all of the internal names of filterable fields in the report, in alphabetical order. Please note that these are not always the same as the column headings on the report. They also aren't always the same as the field names you see when entering values on the program's main window or elsewhere. However, in almost all cases it should be quite clear which field is which.

The Member/Envelope number field is almost always called membernumber or member\_number in the list of fields, if it is present in a report. Sometimes the donation category field will be called description.

If you aren't sure what a column name means, you can always try filtering on it and see what happens!

Some reports contain fields that can be filtered or sorted on, but aren't displayed in the report at all. For instance, in **Reports ⇒ Donor ⇒ Mailing Labels**, when you click **Filter** you will see that you can filter on category1 and category2 (the two Donor Category fields), other\_info\_1 through other\_info\_6, membernumber, email and total\_amount (total amount donated this year, or in the selected range of dates). Although those additional fields are displayed in the Columns drop-down list, none of them are displayed on the actual mailing label! This lets you do things like print mailing labels for only people with a certain Donor Category 1 value, only people that don't have an email address, etc.

### **The Operator Drop Down**

The following operators are available in this drop-down list:

<b>Operator</b>	<b>Meaning</b>
Equals	Displays rows if the selected Column has the exact same value as the entered Value.
Greater Than	Displays rows if the selected Column has a larger value than the entered Value. Not available for date fields. For text fields, the comparisons are in "dictionary order", that is, as if all values being compared were upper case (explained further below).
Later Than	Displays rows if the date in the selected Column is later than (after) the entered Value. Only available for date fields.
Less Than	Displays rows if the selected Column has a smaller value than the entered Value. Not available for date fields. For text fields, the comparisons are in "dictionary order".
Earlier Than	Displays rows if the date in the selected Column is earlier than (before) the entered Value. Only available for date fields.
Greater Than or Equal To	Displays rows if the selected Column has the exact same value, or a larger value, than the entered Value. Not available for date fields. For text fields, the comparisons are in "dictionary order".
Later Than or On	Displays rows if the date in the selected Column is the same as or later than (after) the entered Value. Only available for date fields.

Less Than or Equal To	Displays rows if the selected Column has the exact same value, or a smaller value, than the entered Value. Not available for date fields. For text fields, the comparisons are in "dictionary order".
Early Than or On	Displays rows if the date in the selected Column is the same as or earlier than (before) the entered Value. Only available for date fields.
Not Equal To	Displays rows if the selected Column has a different value from the entered Value.
Like	Displays rows where the selected Column's value matches the wildcard in the entered Value (explained below). Only available for text fields, not numbers or dates.
Not Like	Displays rows where the selected Column's value does <b>not</b> match the wildcard in the entered Value (explained below). Only available for text fields, not numbers or dates.
Is Empty	Displays rows where the selected Column has no value. With this operator, you do not enter a Value, because it is not relevant.
Is Not Empty	Displays rows where the selected Column has a value - any value. With this operator, you do not enter a Value, because it is not relevant.
In	The Value column in this case must be a list of two or more values, separated by commas. (The commas can have spaces before or after them, but that is not required.) Displays rows where the selected Column's value is equal to any one of those comma-separated values, but nothing else.
Not In	The Value column in this case must be a list of two or more values, separated by commas. Displays rows where the selected Column's value is anything other than one of those comma-separated values.
Between	The Value in this case must be two values, separated by " and " (the word "and", with at least one space on either side). Displays rows where the selected Column's value is at least the first of those values (the one before the " and ") and no more than the second of those values (the one after the " and "). This is largely the same as using two conditions, the first using Greater Than or Equal To (or Later Than or On for dates), and the second using Less Than or Equal To (or Earlier Than or On for dates), except that it does <b>not</b> use dictionary order for text fields.

### Dictionary Order

When text fields are compared with Greater Than, Greater Than or Equal To, Less Than, or Less Than or Equal To, there is a slightly complex behaviour about how it deals with upper and lower case, and characters that aren't letters. (This behaviour, and its name, come from the program we use to create DONATION with, and thus we cannot change it.) It is similar to, but not quite identical to, saying that the comparisons are case-insensitive.

What happens is that upper and lower case are ignored - the same way you would ignore them if you were looking up words in a dictionary. In other words, all comparisons are as if both the Column's value and the entered Value were converted to upper case before comparing them.

In addition, all characters other than letters, such as numbers and punctuation symbols, are considered to come **before** all letters in the dictionary order - to be Less Than them. (That part is different from ASCII order, for those who are familiar with that.)

All other comparison operators when comparing text fields (Equals, Not Equals, Like, Not Like, In, Not In, and Between) are case-sensitive - the upper or lower case of the Value field you enter must match that of the data for the filter condition to be considered to be true.

### **Wildcards for Like and Not Like**

To search for values anywhere in a text field, you use the **Like** operator, and percent signs. For instance, suppose you wanted to find addresses in Texas, and figured that you would find them if "TX" was somewhere in addr2 in a report, such as **Reports** ⇒ **Donor** ⇒ **Mailing Labels**. To do that you would fill in the fields as follows (shown as a text table representing the main area of the Simple Filter window in the images above):

Column	Operator	Value	And/Or
addr2	Like	%TX%	

Basically what the "%" means is "anything", that is any number (0 or more) of any characters. So that condition would mean that the Address Line 2 contains TX anywhere within it, including right at the start or right at the end, regardless of what else is in the Column's value.

There is one other wildcard character, the underbar, "\_". It matches exactly one character - any one character. This would be much less commonly used than the percent sign.

### **The Value**

You enter whatever you are comparing the Column's value to, based on the selected Operator, in the Value column. As mentioned in the table of Operators above, the only exception to this is Is Empty or Is Not Empty, where the Value must be omitted.

As mentioned above, numeric values like amounts should not include dollar signs or commas, and they will just be ignored if they are entered.

Do not include quotation marks (single or double) around text values you are comparing things to. (In fact, your filter will be rejected if you enter any quotes, including an apostrophe - which is a single quote - in the Value.) Quotes are added back in for you as needed to the actual technical filter criteria that the program will use internally, which are shown in the **Output Filter Criteria** area on the window.

Do not include round brackets around your comma-separated list of items for the In or Not In operators.

Dates in the Value column must be a valid date in your current Short Date Format from Control Panel's Regional and Language Options tool (the same as you can enter in date fields in the program when doing data entry), or they can be in the exact format YYYY-MM-DD, such as 2019-01-01 or 2019-12-31. Dates entered in your Short Date Format will be reformatted in the YYYY-MM-DD format in the **Output Filter Criteria** area.

An example of using **Between** would be:

Column	Operator	Value	And/Or
amount	Between	100 and 200	

An example of using **In** (to choose any one of three values in this case) would be:

Column	Operator	Value	And/Or
category	In	General,Building,Library	

### The And/Or Value

If you need multiple conditions in your filter, they must be joined by either "And" or "Or" in this column of the window. "And" means that for rows to be displayed, they must match the conditions on all of the rows. "Or" means that for rows to be displayed, they must match the conditions on any one of the rows.

Do not fill in the "And/Or" value on your last row, or if you only have one row.

To avoid confusion about the meaning, if you have three or more rows, you must either use "And" on all of the rows prior to the last one, or use "Or" on all of the rows prior to the last one. You cannot have some rows with "And" and others with "Or".

If you need to mix "And" and "Or" values, you would set up your criteria using all "And" or all "Or", then click the **Advanced Filter** button to further edit the resulting text version of the criteria, to change the And/Or values and insert appropriate parentheses (round brackets) for grouping. An example is in the [Advanced Filter](#) help topic.

As an example of using one of these values, let's go back to finding addresses in Texas (with "TX" in the address). If we are aware that it could be either addr2 or addr3, we would change the criteria to:

Column	Operator	Value	And/Or
addr2	Like	%TX%	Or
addr3	Like	%TX%	

### Managing Multiple Rows of Criteria

As soon as you set the And/Or value to either "And" or "Or", another row will appear below that row for further criteria.

If you have entered a row and no longer want it, you can click the red trash can icon to the right of the row to delete it. If you delete the only row, it will be replaced by a new empty row.

Changing a filter to have only the one empty row then clicking **OK** will remove the filter from the report.

### The Buttons on the Window

The **OK** button first verifies that your filter is valid, then if so, applies it to your report. If it is not valid, you will receive one or more error messages that hopefully will help you fix the filter so that it can work.

The **Verify** button only verifies that your filter is valid, giving appropriate messages, but does not yet apply it to the report.

The **Help** button displays this Help topic.

The **Cancel** button, or pressing **ESC**, cancels creating or editing a filter for the report.

The **Advanced Filter** button takes your currently defined filter as displayed in the **Output Filter Criteria** area, if any, and moves it into a more technical filter window for further editing, in case you need something that cannot be done within the capabilities of this simple filter window. It is described in more details in the [Advanced Filter](#) help topic.

### **Other Areas of this Window**

The **Output Filter Criteria** area below the criteria you enter displays the actual text of the filter you are creating with the simple filter fields in the middle of this window. It shows that in the more technical Advanced Filter format. It is updated for a complete row each time you click out of one field into the next field, or if you click **Verify**.

There is an additional area that can appear at the top of the window, labelled **Input Filter Criteria**. It comes up in the case where you are re-doing a filter on a report that has an Advanced Filter, which can either be one you created in the [Advanced Filter](#) window, or one saved in a [Memorized Report](#) in an earlier release of DONATION that did not have the Simple Filter window. Here is an example from clicking Filter on a previously memorized report:

As you can see, it is pretty clear that what was done before could be re-done as a Simple Filter. If you wanted to re-save the report with a Simple Filter doing the same thing, you would just enter the following criteria:

Column	Operator	Value	And/Or
amount	Greater Than or Equal To	100	

then click **OK**. Then in the displayed report, click **Memorize** to re-memorize it for future use.

### **The Advanced Filter Window**

If you are already familiar with filtering by typing plain-text filters, from prior releases of DONATION, or if you encounter something that does not seem to be able to be done with a Simple Filter, you can click **Advanced Filter** to go to the new window for that. Please see the [Advanced Filter](#) window for details and examples.

### **Memorizing Filtered Reports**

Particularly if you want to be able to re-run the same report in the future with the same or a similar filter, you may want to [memorize](#) it for re-use with the **Memorize** button. That will also memorize any Sort you have added, in addition to the Filter. You can then re-run the memorized report with **Reports** ⇒ **Memorized Reports**.

### **Filters and the Sort Order**

If you put a filter on a report, then while you are still viewing the same report, change or remove that filter in a way that returns some of the previously filtered out rows back to the report, a somewhat surprising thing can occasionally happen.

Specifically, those rows that return to the report because they are no longer filtered out may appear **below** all of the other rows that were already there. That will mean that if that report started with a specific sort order, as most do, it would no longer be sorted appropriately. To fix that, you would have to use the **Sort** button to re-sort the report into the desired order. See [Sorting Reports](#) for details on doing that.

Fortunately, we have set up most of the built-in reports to already prevent this potential problem. The most likely case where you could see this problem is with [Custom Reports](#), or some reports [Memorized](#) before the release that included the Simple Filter window.

### **Reports with Multiple Sections**

Some reports, such as **Reports** ⇒ **One Date Donation**, have (or can have) multiple sections. Some of those reports cannot be filtered at all, for technical reasons. Either the **Filter** button will be disabled (greyed out) for such reports, or if you click **Filter** on them you will be given a message explaining that.

Others of those reports, such as if you pick both the Details section and Summary section of the one mentioned in the previous paragraph, allow filtering, but the filter you define will only apply to the first section of the report (in this case, the Details part). Any further sections (in this case, the Summary part) will be unchanged by the filter. In such cases, you will receive a message informing you of that.

Other reports with multiple sections, like **Reports** ⇒ **Donation** ⇒ **Details, One Page per Donor**, have unexpected behaviour when you try to filter them, though it actually does work correctly on that report. That report has two sections per page, the first showing the detailed donations for each donor, the second showing the category totals of donations for each donor. If you use **Filter**, the only field names that show up are donor fields: full\_name, reversed\_name, the two donor category fields, and the email address. What this means is that the most basic database selection controlling this report is selecting only the donors, not

the donation details, and using **Filter** cannot filter out the donations within each donor. It can only filter out which donors the report is generated for.

## 17.4 Filtering Reports (Advanced)

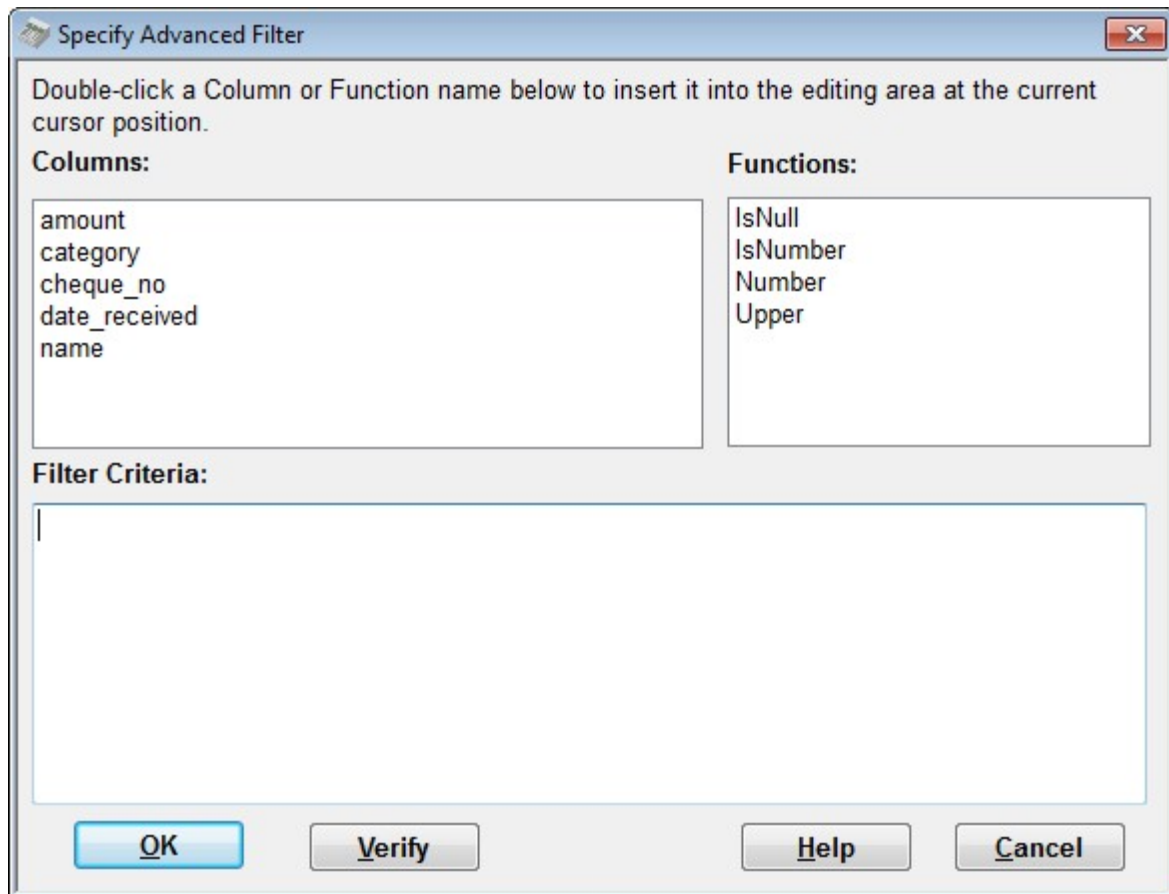
The Advanced Filter window is a somewhat simpler variation of the rather technical filter window used by releases of DONATION prior to release 4.15, which was actually supplied by the programming environment used to create DONATION. It can only be reached by clicking the **Advanced Filter** button from the [Simple Filter](#) window. You can do anything in this window that can be done in a Simple Filter window, and much more, but you have to know what to type, rather than being able to use the drop-down lists.

Please be sure to read the [Simple Filter](#) window's Help as well, if you have not yet done so, because it has more overall information about filters and what you can do with them.

We recommend using this window only if you were already very familiar with filtering with releases of DONATION prior to 4.15, and prefer to keep doing things that same way, or if you hit the rare requirement that cannot be done with just the Simple Filter window. Such requirements are the ones we will particularly explain in this Help topic.

Here's a specific example. If you click **Advanced Filter** in the Simple Filter window for the **Reports ⇒ Donation ⇒ All Donations ⇒ Sort by Name** report when you have not yet specified a simple filter, you will see the following window with an empty text box under Filter Criteria, where you can type your desired filter criteria. (Filter criteria can also be called filter expressions.)





Specify Advanced Filter

Double-click a Column or Function name below to insert it into the editing area at the current cursor position.

Columns:	Functions:
amount	IsNull
category	IsNumber
cheque_no	Number
date_received	Upper
name	

Filter Criteria:

OK Verify Help Cancel

The list of available columns for filtering is in the box at the top left, and is the same list as is in the Columns drop-down list on the Simple Filter window for that same report. As explained in that window's Help, while the names displayed won't exactly match the column headings on the report, you should be able to easily figure out which is which in almost all reports. (If you aren't sure what a column name means, you can always try filtering on it and see what happens!)

If you have already built one or more rows of Simple Filter, or if the Simple Filter window showed an Input Filter Criteria area showing a previously created advanced filter, it will be displayed in the Filter Criteria box for you to continue working on it. We recommend that you first try building a Simple Filter, and if you decide you need something a bit more complex, click **Advanced Filter** after that so that your initial work will be displayed in this window.

There are some rules for entering values in this window that are stricter than in the Simple Filter window:

- Numbers cannot contain dollar signs or commas.
- Dates must be in the exact format YYYY-MM-DD, and should not be quoted.
- Values for IN or NOT IN must be in parentheses (round brackets), like:  
amount in ( 100, 200)
- Text values must be in either single or double quotation marks. If a value to be quoted itself includes a single quote (or apostrophe, which is the same) or a double quote, you must use the other type of quotes to quote it. For instance, "Bob's Garage" would work but 'Bob's Garage' would not.

- Multiple text values for IN, NOT IN, or BETWEEN must be individually quoted, like:  
category in ('General', 'Library')  
or:  
name between 'A' and 'ZZZZ'

Any filter criteria that do not follow those rules will be invalid, and unfortunately the program is not able to tell you what is wrong, only that it is not valid.

### **How to Use this Window**

If you are typing your Filter Criteria from scratch, there are a couple of helpful shortcuts available.

First, double-clicking a Column name will insert it into that Filter Criteria area, at the current cursor position.

Double-clicking a Function name in the top-right box will insert it, followed by parentheses (round brackets) at the current cursor position. If something like a column name is selected (highlighted) in the editing area, double-clicking a Function name surrounds that selected text with the function name and the parentheses. (Functions are described in detail below.)

After typing your desired Filter Criteria, you can click **Verify** to have the program tell you whether or not the filter is valid. Clicking **OK** will first verify the filter, and if it is valid, immediately apply it to the report. Clicking **Cancel** or pressing **ESC** closes this window and goes back to the Simple Filter window. Clicking **Help** shows this help topic.

Changing a filter to be entirely empty (no text shown) then clicking **OK** will remove the filter from the report.

### **Functions**

There are a lot of functions that are actually available for filter criteria, but to keep things simple this window only shows the four that we think you are most likely to find a use for in the program. Each function name is followed by parentheses, inside which you should put a column name, or possibly a more complex expression.

**IsNull:** An expression like:

`IsNull (cheque_no)`

means that that field (Cheque # / Paid By) is empty.

**IsNumber:** An expression like:

`IsNumber (cheque_no)`

means that what is in that field is a number, rather than text (in this case, presumably an actual cheque number).

**Number:** An expression like:

`Number(other_info_1)`

converts whatever is in the Other Info 1 column (which could obviously include characters other than just numeric digits) to a number. If the value has some digits followed by non-digits, it converts only the digits. If the value doesn't start with a digit, it converts it to 0.

**Upper:** This converts whatever is within the parentheses to upper case. So suppose you aren't sure whether your category name is "General" or "GENERAL". Using the expression:

```
Upper ( category ) = " GENERAL "
```

would match either one. (Of course, when you are comparing the upper-case value of a column to a quoted text value, that quoted text value must always be all capital letters, or it could not match!)

The very similar Specify Sort Expression window used for [advanced sorts](#) has one additional function available, **IF**, that is unlikely to be needed here for filters, so it is described in that Help section instead.

### **Operators**

The available operators are exactly the ones in the Simple Filter window, but the versions of them that appear in its Output Filter Criteria window.

The case-sensitivity of the various operators (whether they care about matching upper or lower case) is as mentioned in the main Filtering Reports Help page, in the section headed "Dictionary Order".

When using operators that take multiple values, like "In" and "Between", those values must each follow the rules mentioned above about formatting and quoting. For instance:

```
date_received between 2019-04-01 and 2019-06-30
```

or:

```
category in ( ' General ' , ' Library ' )
```

### **And / Or / Not**

You can use the logical operators "And" and "Or" to separate multiple criteria, and "Not" to turn a criterion into its opposite.

A number of the Operators on the Simple Filter window already have variations available using "Not", specifically "Not Equals" (which in advanced is just the operator "<>") or "Not In" and "Not Like" (which are actually exactly the same in advanced). You can also precede any criterion with "Not" to reverse its sense, as in:

```
Not IsNull ( cheque_no )
```

to mean that the cheque\_no field has something in it (is not empty).

Many cases where you could use "Not" don't need it. The following:

```
Not ( amount > 100 )
```

could instead be replaced by:

```
amount <= 100
```

Parentheses (round brackets) should always be used around each individual criterion that is separated by "And" or "Or" or uses "Not", to make sure that everything is evaluated properly. For instance:

```
( amount > 100 ) and ( category = "General" )
```

### **Cases when Advanced Filters are Needed**

One significant case where you would need to use an Advanced Filter is if you need to mix and match "And" and "Or" logical operators. For instance:

```
(( amount < 100 ) or ( amount > 1000 )) and ( category = "General" )
```

This will select all donations with the category "General", the dollar amount of which is either under a hundred or over a thousand. Note that it is very important that extra parentheses were put around the two criteria about the amount that are separated by "or". If that was not done, it would not be clear how the three criteria would be grouped, and you could get entirely the wrong results.

Another case where you would need an Advanced Filter would be if you need to do something like compare the values of two columns to each other. Suppose you use a report that shows two years of data, like **Reports ⇒ Donor ⇒ Donation Info ⇒ Sort by Name**. That includes two amount fields, which show up as the column names "amount" (for the current year) and "last\_year\_amount" (for the previous year). Let's restrict that report to donors who donated in both years, but this year's amount was less than last year's. To do that, you would use this complex filter expression:

```
(Not IsNull (amount)) and (Not IsNull (last_year_amount)) and (amount < last_year_amount)
```

All of this could be done in the Simple Filter window except for the part "amount < last\_year\_amount".

Other cases where you need to use Advanced Filter are of course ones where you need to use any of the functions as described in examples above.

## **17.5 Sorting Reports**

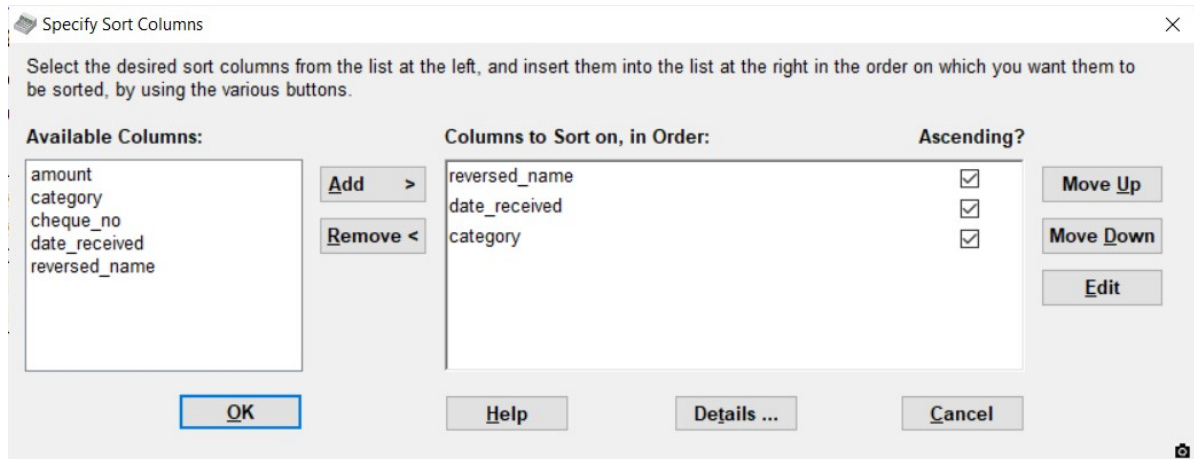
There is a **Sort** button on the reports viewing window. This option allows you to change the order of the data displayed on the report, if you want to see it in another order.

Sorts can also be used for re-ordering data selected for [mail merging](#) with the **Letters ⇒ Mass Mailing** menu option. Although that is not exactly a report, the sorting concepts are the same. The rest of this Help topic will refer exclusively to reports, but everything applies in the same way to Sorting mail merge data.

As an example, suppose you want to list donations in descending order by amount. You might start by creating the **Reports ⇒ Donation ⇒ All Donations ⇒ Sort by Name** report. (There is actually a built-in version of this report sorted by Amount, but for the purposes of this explanation we are getting at the same thing in a different way!)

Now click the **Sort** button. (Do this as you are reading this page, so it will be easier to understand it!)

You will now see the following window, called Specify Sort Columns:



Instructions are written at the top of the window, as you can see in the image above. The box at the left labelled "Available Columns" contains the names of all of the fields (also called columns) on the report that you can sort on. While the names displayed won't exactly match the column headings on the report, you should be able to easily figure out which is which, for almost all reports. (If you aren't sure what a column name means, you can always try sorting on it and see what happens!)

Some reports contain fields that can be [filtered](#) or sorted on, but aren't displayed in the report at all. For instance, in **Reports ⇒ Donor ⇒ Mailing Labels**, when you click **Sort** you will see that you can sort on category1 and category2 (the two Donor Category fields), other\_info\_1 through other\_info\_6, membernumber, email and total\_amount (total amount donated this year, or in the selected range of dates). Although those additional fields are displayed in the "Available Columns" box, none of them are displayed on the actual mailing label! Realistically, those non-displayed columns are more likely to be of interest to you for filtering than for sorting.

With some reports, when you click **Sort** you will also get a message box, warning you that the report has group breaks, and that changing the sort order could cause problems. What can happen with inappropriate changes to the sort order in such reports is that groups get repeated, because not all lines of the report that should be in the same group are sorted together.

In some reports you may see technical column names like internal\_donornum or soundex, that the report shows as already being sorted on in the box at the right, "Columns to sort on, in Order". Those are special internal columns in the data of the report that that specific report is sorted on, and in most cases you should not change that or the report could be seriously messed up!

As mentioned, the box at the right, labelled "Columns to Sort on, in Order", shows the current sort order for the report, and is where you put column names to specify that order.

Although most reports are sorted, the current sort order may in some cases not already be displayed in the box on the right when you bring up this sort window for the first time for a given report. That's for technical reasons, which are a bit hard to explain. (Likely the only case where you will see this is with **Custom Reports**.) In such cases, it should be pretty easy to see what the current sort order is, by looking at the report before you click **Sort**.

In the example described above, you want to sort on the Amount column, and the obvious guess is a column called "amount". You can get it to the box on the right either by double-clicking on it, or clicking on it to select it and then clicking the **Add** button. That will put it below any existing columns there, in this case the "name" and "date\_received" columns. To move it up to the top, so it is the highest priority for sorting, click the **Move Up** button three times.

The **Move Up** and **Move Down** buttons will move a selected item in the "Columns to Sort on" box up or down to specify the sorting priority.

When multiple columns are in the "Columns to sort on" box, as in the example above, it first sorts by the first column listed, and then it only sorts on the 2nd column listed if the values in the 1st column are the same, and similarly for further columns. For instance, suppose you have sorted on "amount", "name" and "date\_received" as in this example. The report will mostly be sorted on the amount, but if there are two donations for \$1,000, then those two will be sorted by the donor's name, and if there are two with the same amount and same name, they will be sorted in order of date\_received.

You will also see a checkbox to the right of where the name appears, labelled "Ascending?", which is checked. You want to see it in descending order (from the highest down to the lowest Amount), so click that checkbox to uncheck it. Now click on the **OK** button and it will sort your report in the order you wanted.

You can remove a column from the sort by moving it out of the "Columns to Sort On" box, by either double-clicking it in that box, or clicking on it to select it then clicking **Remove**. (The columns in the "Available Columns" box never change - they are always all displayed.)

Please note that if you remove all of the sort columns, the report won't necessarily go back to its original order. In fact, if you do that then press OK, the report will not change at all. To get back to that original order, **Close** the report and run it again from the **Reports** menu. Each time you create this report, it will be displayed in its original order. Your sort order from a previous run is not remembered - but see the section below about Memorizing Sorted Reports for how you can do that.

Some reports may not work properly with arbitrary Sort orders. For those reports, the **Sort** button is disabled.

When you change the sort order, part of the header of most reports will change to reflect the new order you have chosen. The only exception to this is if you also change the filter (see [Filtering Reports](#)), in which case the revised filter criteria will show in the header instead.

### The Details Button

Clicking the **Details ...** button in this window displays the technical sort expression that will be used internally in the program to make this sort happen, and it also copies that to your Windows clipboard, so that it could be pasted somewhere else with **Ctrl+V**. This is only

needed for one purpose: to find out a correct sort order expressing for a SortReport command in an automated [reports script](#).

### Complex Expressions for Sorting

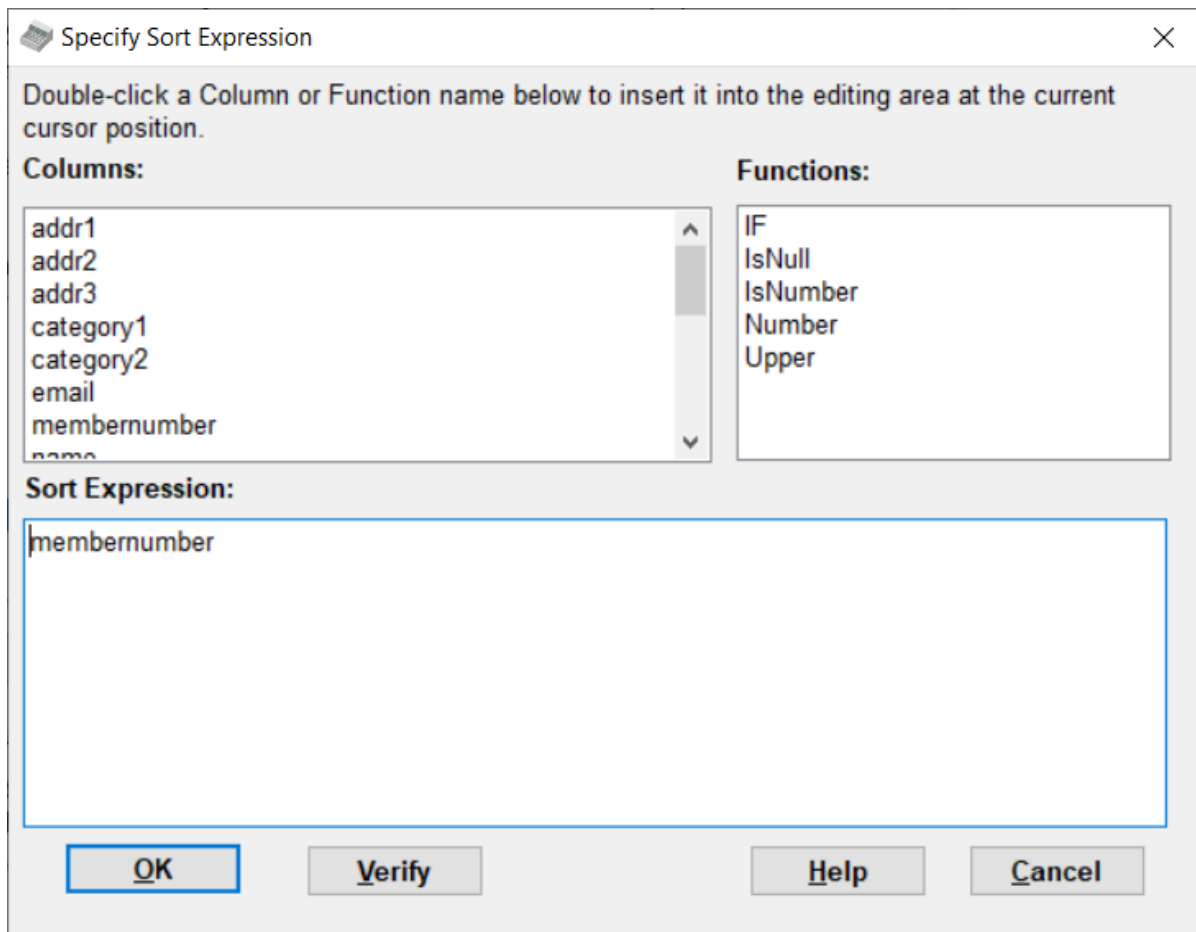
You can actually edit columns that you are sorting on, to change them into complex expressions that do something tricky. Here are a couple of examples explained in detail.

If you want to sort a report on the Member/Envelope number, not all donors have such numbers. So if you just sort on that field, everyone without a Member/Envelope number will appear first in the report, followed by everyone with such a number, in order by that number. That's probably not what you want - you would prefer everyone with a number first. While many built-in reports that sort on that field already have the fix described below built in, the following instructions can be used if it is not built in, such as if you are building a [Custom Report](#) using that field.

Let's use the example of **Reports ⇒ Donor ⇒ Mailing Labels with Member/Envelope #**, running it for all donors. Its built-in sort is only on the reversed\_name field (such as "Smith, John").

If we do want to instead sort those mailing labels first on the Member/Envelope #, with all donors with such numbers coming first, do as follows. First, in the Sort window, make sure the column named "membernumber" (or whatever it is named in the report you are using) is in the "Columns to Sort on" box. You will want it to be the top column name if there are other columns in that box. Then, click on it there to select it, and click **Edit**. After you answer a question to confirm you want to do that editing, the program will bring up a Specify Sort Expression window such as the following (in the report mentioned above).





You will see "membernumber" (without the quotes) in the Sort Expression box at the bottom. Change that to:

```
IF ( IsNull ( membernumber ), 999999999, membernumber )
```

(None of the spaces are required, they are just for clarity.)

More instructions for using this window, including the meanings of the Functions in the top-right box, are in the Help on the [Advanced Filter](#) window, but you can always just type what you want.

Once you have made your change, you can click **Verify** if you want, to check whether it is a valid expression. (Unfortunately, not all expressions that the program will allow are actually sensible sort orders!)

Then click **OK** to go back to the main sort window, where you will see your expression displayed. (It also verifies when you click **OK**, and doesn't let you exit this editing window if it isn't valid.) Click **OK** again to apply the new sort. That forces all of the rows with no Member/Envelope number to be treated as if they had the number 999999999 and thus come out at the bottom of the report, and all of the rows with a number to come out at the top, in order. If further sort orders were included after this one, the rows without a number would be sorted in those additional orders. If all of your donors have Member/Envelope numbers, or

you don't mind if those without one to sort to the top, you can just let the sort be on the `membernumber` column itself instead.

One function used in the example above but **not** described in the Help on the Advanced Filter window, because it is very unlikely to be needed there, is "IF". An expression such as:

```
IF (condition, value1, value2)
```

requires that the `condition` part be something that is true or false. If it is true, the result of the entire expression is `value1`. If it is false, the result of the entire expression is `value2`. Each of `condition`, `value1` and `value2` can themselves be expressions - the `condition` pretty much has to be.

A 2nd example that required using complex sort expressions came to us from a user who wanted a report that was sorted by donation categories to show the category "Tithes and Offerings" first, before all other categories. To do that, we had them sort on the category field, then double-click on it to get to the Specify Sort Expression window, and enter the following expression:

```
IF ( category = "Tithes and Offerings", "", category )
```

That sorts "Tithes and Offerings" as if it was nothing (and thus sorts it to the top) and sorts everything else normally by its category value.

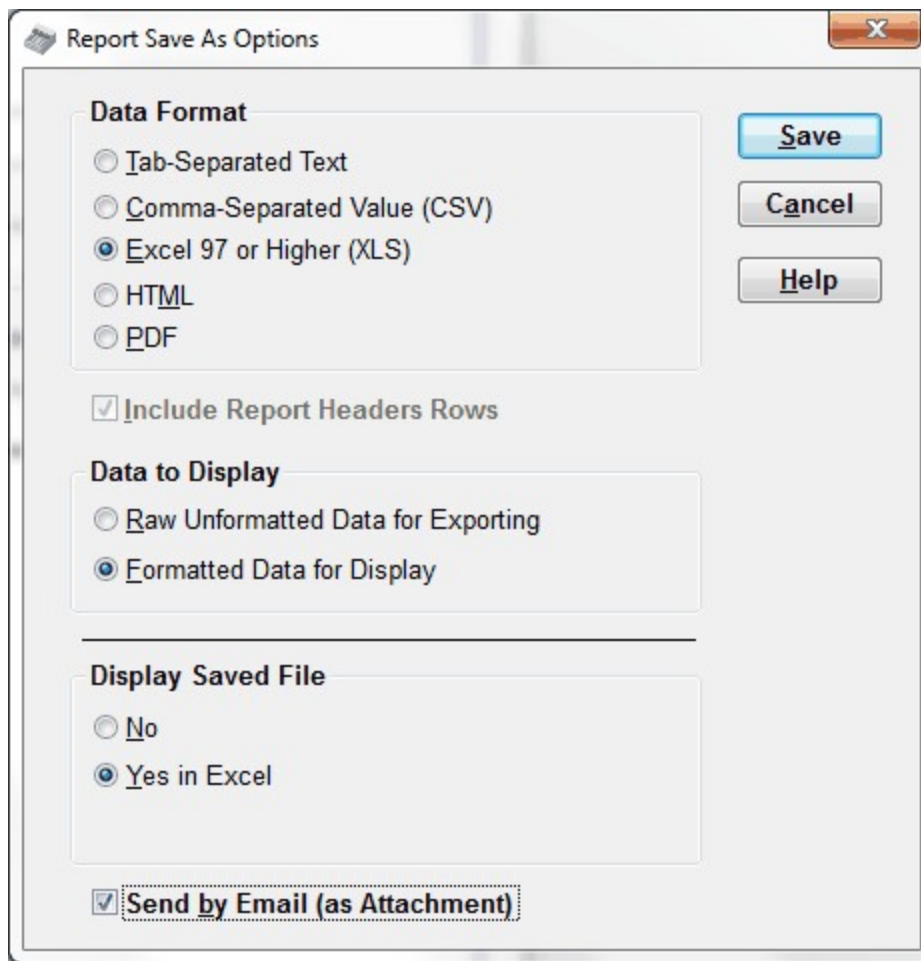
#### Memorizing Sorted Reports

Particularly if you will want to re-run the same report in the future with the same sort, you may want to [memorize](#) it for re-use with the **Memorize** button. That will also memorize any [Filter](#) you have added. You can then re-run the memorized report with **Reports ⇒ Memorized Reports**.

## 17.6 Saving Reports to Files

You can save your report to one of a number of file formats with the **Save As** button: tab-separated Text, CSV (comma-separated Value), Excel, HTML and PDF. Some of the options yield a file which looks either somewhat like or very much like the original report; others just export raw data from the report.

When you click **Save As**, the following window comes up:



The following sections of this page explain the sections and options on this window:

### Data Format

Here you choose between Text, CSV, Excel, HTML and PDF. Which one of these you choose can affect which of the options in the other sections are available, and in some cases the wording of the options in those other sections. Details will be described below.

For exporting raw data, for example for importing into another program, you use the Text, CSV or Excel options, with the "Raw Unformatted Data for Exporting" selection under Data to Display.

For display (to be able to see something very much like the report on screen), you use the Excel, HTML or PDF options, with the "Formatted Data for Display" selection under Data to Display.

There are a few reports in the program that for technical reasons cannot be exported to Text, CSV, Excel (with "Raw Unformatted Data for Exporting" selected) or HTML. If you click **Save As** when you are viewing one of those reports, those options will be disabled. You will still be able to export those reports to Excel (with "Formatted Data for Display" selected) or PDF. With a few other reports, only parts of the report will be exported when you select Text, CSV, Excel (with "Raw Unformatted Data for Exporting" selected) or HTML.

### Include Report Headers Rows / Include Column Headers Row

The text of this checkbox changes depending on whether the Data to Display is set to "Raw Unformatted Data for Exporting" or "Formatted Data for Display". It is only in the former case that you have an option here - with "Formatted Data for Display", this is always checked, and it is disabled (greyed out) as seen in the above screen shot.

### Data to Display

For the Data Formats Text and CSV, only "Raw Unformatted Data for Exporting" is available. For the Data Formats HTML and PDF, only "Formatted Data for Display" is available. It is only with the Data Format Excel that you have a choice, of Raw or Formatted data.

With the Raw selection, all data from each record will be across one row, regardless of the formatting of the original report on the screen. Totals will not be included. Numbers will not be formatted (for example you will see "1000.00" rather than "\$1,000.00"). And if there are extra columns included in the report for filtering or sorting purposes that aren't displayed as part of the report, they will also be exported. Column headers (if you include them by checking the "Include Column Headers Row" checkbox may not read exactly as they do on the report.

With the Formatted selection, the report will display exactly (or almost exactly!) as it does on the screen or on the printed page, to the extent that it is possible with the given format, and the technology being used to save it to that format. One problem that has been observed with saving to Formatted Excel is that the result can end up wider than it should be, so that the report spreads onto two pages horizontally instead of one.

### Display Saved File

You may or may not wish to display the saved file in an appropriate program after saving it. In this section, you can choose between "No", and "Yes in *some program*". Here, "*some program*" is replaced by options for one or two programs, depending on the Data Format you selected. Text files can be displayed in Notepad (which is a very simple text file editor). CSV files can be displayed in Excel or Notepad. Excel files can only be displayed in Excel. HTML files can be displayed in your default web browser (such as Internet Explorer) or in Excel, though usually saving them as Excel will work better for that. And PDF files will be displayed in your default PDF viewer (usually Adobe Reader).

Note: If you select "Yes in Excel", and you don't have Microsoft Excel installed on your computer but you have another program installed that is set up to open Excel files (such as [Open Office](#)), the saved file will open in that other program instead. In fact, if you have the free open source office suite Open Office installed rather than Excel, it will automatically be used (whether or not it is specially set up to open Excel files).

### Send by Email (as Attachment)

If you check this checkbox, after the file is saved, and displayed (if you chose a "Yes" option under Display Saved File), a window comes up that allows you to email the file to anyone you wish, as an attachment. This requires that your [Email Sending Configuration](#) has been configured, using the **Maintenance ⇒ Email Sending Configuration** menu option.

See the page on [Sending Emails to a Donor](#) for a sample of the window used for sending the email. You can change the To name and email address, the Subject line, and the Body of the email, but not the Attachment - it will always be the file you just saved. You also have the option of Cc-ing or Bcc-ing the email to yourself, if you are sending to someone else. Whatever you use as the To name and email address, Subject and Body will be saved and redisplayed for your use the next time you send an email via this window, so that if you are normally sending the same report to the same person, you shouldn't have to re-write the email you send it with!

The To Email can include multiple email addresses separated by semicolons, such as "john@gmail.com;mary@gmail.com", without the quotes. If you do that, a single email will get sent, with both addresses on the "To" line.

### Action Buttons

Clicking **Save** first brings up a window in which you can select the directory in which you wish to save the file, and the filename. It then does the save of the file as specified in the various options, and optionally displays the file in an appropriate program as specified under Display Saved File, and optionally brings up the window for you to email the file if you checked that option.

Clicking **Cancel** closes this window. Clicking **Help** brings up this help page.

### Uses of Save As

The most common uses are to provide exported data from a report to someone else, for importing into another program, or to send someone a viewable version of a report.

Another use of **Save As** is for doing your own [mail merges](#), instead of using the [built-in mail merge](#) facilities in the program.

Another thing you might want to do with **Save As** is to create limited versions of reports provided by this program. For instance, suppose you wanted a report listing only Member #, Last Name, and First Name. Find a report that includes that data (and more) such as **Reports** ⇒ **Donor** ⇒ **Donation Info** ⇒ **Sort by Member/Envelope #**. Run the report, then do the **Save As**, and save it in the Excel format. (I will assume you have Microsoft Excel.) Use the option to have it open the saved file in Excel, then delete the columns that you aren't interested in. Make any other desired changes (such as fixing up column widths and column headings), then print it.

However, this is usually not necessary, because you can create reports with just the fields that you want in them using the **Reports** ⇒ **Custom Report** [menu option](#).

### Error Messages on Save As

You may receive an error message if a Save As fails. Unfortunately the program is not able to determine why it failed, so the error message mentions a few possibilities.

The most likely possibility is if you selected to save the file in a directory to which non-administrative users in Windows don't have write access, such as a directory under C:\Program Files.

### **Save As versus Save PDF**

The report-viewing window also has a **Save PDF** [button](#). It does basically the same thing as using the PDF Data Format option on this window, except it always displays the file in your default PDF viewer program after creating it, and it does not give you an option to email the file as an attachment.

### **Issues with Save As to Formatted Excel**

Some aspects of some reports in DONATION may not come up properly when you save to Excel. Unfortunately, the saving to Excel is done by a 3rd-party program that we purchased, which has a number of bugs that the vendor is not fixing, and would be extremely difficult to replace with our own code that worked better. In some cases there could also be missing data in the exported Excel files. You will have to carefully check any reports exported to formatted Excel before you use them. *If you encounter any reports where the save the formatted Excel has missing data, please contact us immediately with full details, so we can try to fix that report.*

## **17.7 Creating Custom Reports**

You can use **Reports** ⇒ **Custom Report** to create your own relatively simple reports, displayed exactly the fields you want.

### **Quick Instructions**

After using that menu option, just pick the fields you want from the displayed lists of columns, if desired pick a range of years or options for date and donation category selection in the 2nd section of the window, check "Hide SQL Text on Next Window", and click **OK**.

On the next window, you will be able to specify a Title for the report, and a couple of other options, then click **Run** to show the report.

### **Full Instructions**

This is actually one of two ways to create custom reports. This way using **Reports** ⇒ **Custom Report** uses a fairly simple window, where you select fields (also called columns) from lists, and select the range of years to report on. When you click OK, it determines the SQL (Structured Query Language) statement that will be used to select the report data, and optionally displays that SQL in the same window that **Database** ⇒ **SQL Select** displays.

The other way to create custom reports is to use the [SQL Select](#) utility directly. You should read the section on that to see what it can do. With it, you can adapt the SQL from existing reports, or write your own entirely new reports, but you do have to have at least minimal knowledge of SQL to do so. With the **Reports** ⇒ **Custom Report** option, you can create reports without knowing any SQL, so it is a much easier option for most users!

When you use the **Reports** ⇒ **Custom Report** utility, the following window comes up:



**Create Custom Report**

**Select Columns to Include in the Report**

Donor ☐ Include All Donors

Donation

Receipt

Pledge

**Select Years to Include, and any Selection Criteria**

From: 2021 ☒ No criteria ☐ For only one donation date

To: 2021 ☐ For a range of donation dates ☐ For a fiscal year date range

☐ For a range of dates and one category ☐ For a fiscal year date range and one category

**Multiple Year Totals**

If doing totals for multiple years, do you want those totals to be a grand total for all years, or separate totals for each year?

☐ Grand Total Only ☐ Separate Totals Only ☐ Separate and Grand Totals

☐ Hide SQL Text on Next Window (Leave this unchecked if you want to add subtotal breaks to your report.)

OK Help Close

You will see that in the first section of the window, there are four lists of columns that you can select, from the Donor, Donation, Receipt and Pledge tables. A table is what SQL calls the collection of data of one type, for example the Donor table contains all of the Donor information that you type onto the main screen. A column or field is one piece of information within a table, such as the Last Name in the Donor table.

Note: The Pledge fields are not actually in a separate table in the database, but it seemed clearer to group them together into one list for use in Custom Reports. The Pledge list disappears from this window if you have selected not to display the Annual Pledge field on the Donors tab of the **Maintenance** ⇒ **Main Window Options** [window](#). If the Pledge list is displayed, which columns are listed in it depends on which option you have selected on the Pledge tab of that same main window options window. (Further details are [below](#).)

If you enter the program with the [Donors Only Password](#), only the Donor list of fields and the buttons at the bottom of the window are displayed - everything else is removed.

Exactly which fields are displayed in each list depend on which fields you have chosen to show, in the **Maintenance** ⇒ **Main Window Options** [window](#), and for the Pledge list, depends on which type of pledging you have chosen in the Pledges tab of that window.

### Selecting Columns

The first thing you need to do is select the columns that you want to be included in the report. Just click on each column that you want included, which selects it. If you change your mind



about including a column, click on it again to deselect it. To see all of the columns in the Donor or Donation tables, you will have to scroll down their lists.

Most of the column names shown in the four lists should be very obvious, because they match one or more pieces of data that are entered or displayed on the main window of the program. The Receipt table columns are mostly not displayed on the main window, but we hope their meanings will also be obvious. Here are a few that aren't quite as obvious, and other important details:

- In the Donor and Donation tables, fields that are set to not be displayed on the main window (via **Maintenance** ⇒ **Main Window Options**) are not displayed in the lists of fields here.
- In the Donor table, whether the first displayed field shows up as "Envelope #" or "Member #" depends on the setting for "Label for Member/Env. #" in the **Maintenance** ⇒ **Receipt Options** [window](#).
- In the Donor Table, "Name" is the Business Name if it exists, and otherwise the same as "First Last" (see below for details on that).
- In the Donor Table, "Reversed Name" is the Business Name if it exists, and otherwise the same as "Last, First" (see below for details on that).
- In the Donor table, "First Last" joins the names in that format, for example "Mary Smith", but it will never display the Business Name. The advantage of using this over using First Name and Last Name separately is that you don't have the First Name and Last Name displayed in separate columns, taking up a lot of width in the report.
- In the Donor table, "Last, First" would similarly display the name in the previous example as "Smith, Mary", but will never display the Business Name.
- None of the four name fields mentioned in the points above this ever include the donor's Title or Middle Initial, if they have been entered. There are additional donor fields Title and Middle Initial for just those fields separately, and Name with Title, Name with Middle, Name with Title and Middle, Reversed Name with Middle, Title First Last, Title First Middle Last, and "Last, First Middle" that include any entered Title and/or Middle appropriately based on the name of the selected field. Those fields will **not** appear if the relevant "Show Field" checkboxes for showing the Title or Middle Initial donor detail fields on the **Maintenance** ⇒ **Main Window Options** window are not checked.
- Unless you select more than one of the various composite name fields like "Name", "Reversed Name", "First Last", "Last First", or the ones including "Middle" or "Title", the column heading for the composite name field you do select (if any) will be just "Name" in the resulting report.
- In the Donor table, the "# Donors" column allows you to do summary reports, that include a count of donors on each row.
- In the Donation table, "Month Received" is the number and name of the month of the Date Received of the donation - values "01 - January" through "12 - December". This could be used for summary reports by month, and you could [Sort](#) on it to get them in order.
- In the Donation table, "Quarter Received" is the standard text for the quarter of the calendar year (Q1 to Q4) of the Date Received of the donation. So Q1 is January 1 to March 31, Q2 is April 1 to June 30, etc. This could be used for summary reports by quarter, and you could [Sort](#) on it to get them in order.
- In the Donation table, "Year Received" is what you would expect - the year of the donation. You would probably only use that if you were doing a multi-year report, in which case you would also have to choose an option from the Multiple Years Totals section of the window. If you use this field, you should choose Grand Total Only from that section. If you instead chose an option with Separate Totals, there would both be separate rows of

data for the different years, and separate columns of data for the different years, which wouldn't be helpful.

- In the Donation table, "Batch" will be a description you put in for a batch entered via [Batch Entry](#), if you use such descriptions. If you have turned off using those descriptions, by unchecking the "Use Batch Descriptions" checkbox in the Donations tab of **Maintenance** ⇒ **Main Window Options**, the Batch column will not appear here.
- In the Donor table, the Comments column is obvious, but you should be aware that it won't always print well on reports, and generally only the first line or so will be displayed. However, you will be able to see the complete comment if you export it using the **Save As** button on the reports window.
- In the Donation table, the Sum(Total Amount) and Sum(Eligible Amount) columns allow you to do summary reports, for example total donation amounts by donor, rather than the detailed reports of donations that you will get if you select other columns from the Donation table but no summary columns.
- In the Donation table, the "# Donations" column allows you to do summary reports, that include a count of donations on each row.
- In the Donation table, Paid By is the same as whatever you have entered in the Cheque # / Paid By column for the Donation, except that if you have entered a cheque number, it will just show as "Cheque" (or "Check" for US users).
- In the Receipt table, Type is "Original", "Duplicate", or "Corrected". (For Canadian receipts, it can be more complex options, as explained in the Help section [Replacement or Correction Receipts for Canada](#).)
- Details about the Pledge list are in a separate section [below](#).

#### Include All Donors Checkbox

This checkbox, located to the right of the heading for the list of Donor columns, is only relevant to Custom Reports that include fields from both the Donor and Donation columns, and only those two columns.

If you do not check the checkbox, the only donors that will be included in the report are ones with donations. (If selection criteria, as described below, are used, the only donors that are included are ones with donations matching the selection criteria.) This was the behaviour in all releases of DONATION prior to the addition of this checkbox, in release number 4.20.

If you **do** check the Include All Donors checkbox, all donors will be included in the report, even if they have no donations (or no donations matching any selection criteria you use). For donors with no matching donations, only the donor fields will appear in the report - the donation columns for those donors will be empty.

#### Ranges of Years and Selection Criteria

In the second section of this window (as long as you have selected at least one column from the Donation table), you can select a range of years to report on, using the **From** and **To** drop-down lists of years present in your database. This defaults to reporting on just the current working year, which in most cases will be what you want. (If you select Pledge fields, you cannot change the year - it is always reporting on the current year, or for multi-year pledging, on all years included in each donors' pledge.)

If you leave the From and To years being the current year, and you have selected at least one field from the Donation table, then the five radio buttons (other than "None") at the right in this section will be enabled (otherwise, they are greyed out, so you can't use them). Selecting

one of these will cause the report, when run, to prompt for one donation date to report on, a range of donation dates to report on, a range of donation dates and optionally also a donation category to report on, a range of dates within the fiscal year to report on, or a range of dates within the fiscal year and optionally also a donation category to report on.

If you select any of the radio button options that require the entry of a date, range of dates, and/or a category, you will be prompted for the required information after you click **OK** in this window, and then click **Run** in the window that comes up next, titled "Run SQL Select Statement".

The fiscal year selection options are only available if you have set up a fiscal year different from the calendar year in the **Maintenance** ⇒ **Organization Info** [window](#). And you can only use them for the current fiscal year. (See [Fiscal Years in DONATION](#) for a full explanation of what that means.) If you select the "For a fiscal year date range" or the "For a fiscal year date range and one category" radio button, the date selection window displayed will only allow you to select dates from within the current fiscal year, defaulting to the start and end of that fiscal year.

If you are in a country such as the United Kingdom, Australia or New Zealand, and have selected to use [Fiscal Year Data Entry and Receipting](#), then the years listed in the **From** and **To** drop-downs will include fiscal years. If you are working on a year that is a fiscal year, the radio buttons "For the fiscal year" doesn't really do anything, because it would be reporting on the fiscal year anyways. The radio buttons for deleting a date or range of dates work within that working fiscal year.

#### Donors used in Multiple Year Reports

A report for just the current working year and the previous year will automatically include any donors in the earlier year which are missing in the later year. However, reports for any other two years, or over two years, only include donors that are present in the last of those years.

To make sure that data isn't omitted from your report that should be included, in the cases mentioned above the program will check whether there are donors in any of the prior years that aren't in the last year of the report. If there are, it will ask you whether you want to copy those missing donors forward into the last year, to make the report correct. Answering **Yes** to that question has the same effect as using the **Database** ⇒ **Copy Missing Donors** [menu option](#).

This issue is not relevant, and will not lead to any questions, if you do not select any donor columns, or you do select donor columns but you don't select any donation or receipt columns.

#### Multiple Year Totals

The third section of this window, for the type of totalling to do, is usually greyed out (inactive) because it does not apply. The only time it applies is if you have selected the Sum(Total Amount) and/or Sum(Eligible Amount) and or # Donations columns in the Donation table, and have also selected a range of years (not just one year) in the second section. In that case, as soon as you change the years in the second section, this section becomes active, and allows you to select whether those Sum fields or # Donation field that you selected should be a Grand Total Only for all years (for example just one column showing the total or count of

donors giving during all of those years), Separate Totals Only (one column for each year's total and/or count), or both Separate and Grand Totals.

#### Hide SQL Text on Next Window, and Subtotals for Reports

If you check this checkbox, then when you click **OK** to run this report (explained in more details below), the next window that comes up is "Run Custom Report", and does not display the generated SQL. If you do not check it, the next window that comes up is "Run SQL Select Statement" and does display the generated window.

Most users who are not particularly technical and not interested in seeing the generated SQL will probably prefer to check this checkbox.

However, please note the text to the right of "Hide SQL Text on Next Window", namely "Leave this unchecked if you want to add subtotal breaks to your report." If you do leave it unchecked, then when you come to the [SQL Select](#) window, there will be an **Add Subtotals** button that allows you to choose a field on which to have subtotal breaks and subtotals automatically created when the report is run, optionally with page breaks on each change in that field's value. Details are under [Adding Subtotals to your Report](#) in the SQL Select help topic.

#### Sort Orders for Reports

There are three situations in which the SQL generated for a Custom Report will have a built-in sort order ("ORDER BY" section at the end of it):

1. If you include summary columns like "Sum(Total Amount)", the sort order will be on all of the non-summary columns, in the order they appear.
2. If you do not include summary columns, but you include the Envelope # or Member # column, the sort will be first on that (with donors with such numbers appearing first), and then for donors with no such number, if you included a Name field (as described in the next point), the sort for the donors with no such number will be on the donor's reversed name (like "Smith, John"). This is regardless of what Name field you chose to display in the report!
3. If you do not include summary columns or the Envelope # or Member # column, but you do include a full name field (not just partial name fields like Last Name etc.), the sort will again be on the donor's reversed name (like "Smith, John"). This is regardless of what Name field you chose to display in the report!

In all other cases, no sort will be included in the generated SQL, and your report may appear in any arbitrary order when you run it. You can use the [Sort](#) button in that case (or if you don't like the order that comes up because of the three rules above) to get the displayed report into your desired order.

#### Running the Report

Once you have made all of your selections, click **OK**. Certain selections of columns and other options don't actually make sense (or aren't usable for some tricky technical reasons), so it is possible that you will get an error message at this point. If so, read it carefully, and adjust your selections accordingly. If you don't get an error message, you will then be put onto the [SQL Select](#) window (titled "Run SQL Select Statement", or alternatively titled "Run Custom Report" if you clicked the **Hide SQL Text on Next Window** checkbox).

If it's the Run SQL Select Statement window, the generated SQL that will create this report will be displayed, while if it is the Run Custom Report window the SQL will be hidden. At that point you can use all of the features of that window, including further editing the generated SQL (if it's displayed) and specifying a Report Title, and then click the **Run** button to generate the report. It is actually at that point that prompting window for a range of dates and/or categories, based on the radio buttons you selected on this Custom Reports window, will appear.

Some of you who have used other report builders may notice that there are several things that they might include that this utility does not. Among other things, we don't allow you to specify the order of the columns, or conditions other than those in the second section (for example "only if the Total Amount is over \$1,000"), or sort orders, or totals (other than Total Amount) or subtotals. (The report builder and SQL Select do automatically total any columns containing dollar figures or counts of donors or donations.) We decided that this window should have those limitations in order to keep it simple enough for everyone to use.

Also, those who do know a bit of SQL can get some of these effects (changing the column order, conditions and sorts) by editing the SQL in the SQL Select window. It is easy to change the column order – just cut and paste in the list of selected columns, making sure that each column in the SQL ends with a comma, except for the last one. Those who don't know any SQL can use the [Sort](#) and [Filter](#) buttons on the Reports window after generating the report to impose sort orders or conditions. You actually can't impose all of the conditions with the Filter button that you could by editing the SQL, but you can cover most of the cases. You can also change the column order in the Reports window, if you select the Grid Style for the report on the SQL Select window. (You can drag the column headers around to change their order.)

If you need to enhance the report further, we suggest that you use the **Save As** [button](#) on the Reports window to save the report to a spreadsheet format (for example Excel), and use your spreadsheet program to enhance it. However, please see the warnings [here](#) about possible problems with exporting to formatted Excel.

### Re-Using Custom Reports

You can memorize a Custom Report you have created by using the **Memorize Report** button on the SQL Select window, or on the following window displaying a report, and then replay it with the **Reports** ⇒ **Memorized Reports** [menu option](#). (If you wait to memorize the report until you are on the window displaying the report, that has the advantage that if you used the [Sort](#) or [Filter](#) buttons on that window, the Sort and Filter conditions you added are also part of the memorized report.)

There's one other way to memorize a report, but in general it is not as useful as the **Memorize Report** option. On the SQL Select window, you can use the **Save to SQL File** button to save the SQL for this report. Then, by returning to **Database** ⇒ **SQL Select**, you can use the **Open SQL File** button to retrieve that saved SQL, and run the same report again. This will give exactly the same results as if you re-selected the same options on the Create Custom Report window. However, unlike **Memorize Report**, it doesn't memorize the Report Title, or your Report Style and Orientation options, and since you haven't run the report yet, it can't memorize any Sort or Filter.

### Pledge Fields

Which Pledge-related fields are displayed depends on which options you select on the [Pledge tab](#) of the **Maintenance ⇒ Main Window Options** window, as follows:

Type	Fields
Simple Annual Pledge	Annual Pledge, Pledge Paid, Pledge Outstanding
Annual with Start Date and Category	Current Pledge, Pledge Start Date (but only if you have <b>not</b> checked the "Pledges are on a fiscal year basis" checkbox on the Pledge tab of the <b>Maintenance ⇒ Main Window Options</b> window), Pledge Category, Pledge Paid, Pledge Outstanding
Multi-Year	Current Pledge (this year's pledged amount), Total Pledge (total of all year's pledged amounts), Pledge Start Date, Pledge Years, Pledge End Date, Pledge Category, Pledge Frequency (payment frequency, such as Annual etc.), Pledge Paid (in the current year), Pledge Outstanding (in the current year), Total Pledge Paid (for all years within the donor's pledge period), Total Pledge Outstanding (for all years)

The Outstanding fields are always the value in the relevant pledge amount field (such as Annual Pledge, Current Pledge or Total Pledge) minus the value in the relevant Pledge Paid field (either Pledge Paid or Total Pledge Paid).

If you have checked the "Pledges are on a fiscal year basis" checkbox on the Pledge tab of the **Maintenance ⇒ Main Window Options** window, and you create a Custom Report including Pledge fields, you may be prompted for which fiscal year you want to report on. For details, see [Pledges in DONATION](#). One consequence of this is that the generated SQL for the report may include the specific dates of your selected fiscal year, which may make that report less appropriate to [memorize](#), since at some point it will no longer be for the dates you want!

### Using Reports Scripts for Custom Reports

You can run memorized Custom Reports with automated [reports scripts](#). The `RunMemorizedReport()` command will be used, with the argument `Name=` and the name of the memorized report, as shown in the window for running them.

Any additional arguments to that command will be based on any Selection Criteria you chose in the middle section of the Custom Reports window (or on what you can see it prompting for, if you try to run it normally).

Possibilities include:

1. If you chose "For only one donation date":  
`Date=`, which can be a named date or specific date in your computer's date entry format (see [here](#) for more details)
2. If you chose "For a range of donation dates", or "For a fiscal year date range" (if it's shown as an option):  
`DateRange=`, or `StartDate=` and `EndDate=` (see [here](#) for more details)
3. If you chose "For a range of donation dates and one category", or "For a fiscal year date range and one category" (if it's shown as an option):



DateRange=, or StartDate= and EndDate= (see [here](#) for more details)  
Category= (All, or a donation category name)

For either of the "fiscal year" options, DateRange= values that you choose will likely be for a fiscal year, such as `This Fiscal Year`.

## 17.8 Exporting Data from the Program

There are several ways to export data from the program. You might wish to export the data in order to process it in some way in Excel or another spreadsheet program, or because you are switching to a different software program and you want to import the data that you currently have in DONATION into that other program. You may also want to export the data from reports, in order to format it differently or use it in some other way.

The primary way to export data from DONATION is to be on a Report output window, and click the **Save As** button. For details, see [Saving Reports to Files](#).

However, there are several ways to get to a Report output window. The most obvious is by running a report from the **Reports menu**. Please note, however, that certain complex reports do not export any data, or only export a portion of their data. Other reports actually export additional data that is not visible on the report!

The next way to generate a report is with the **Reports ⇒ Custom Report menu option**, which lets you choose exactly the fields you want.

You can also generate a report directly with the **Database ⇒ SQL Select menu option**. That allows you to export any data that you want to export, whether there is a report that includes it or not, but it does require some minor use of SQL, the internal language used with the database to retrieve data. Read the [help page](#) about that for more details.

Once you have your report displayed, if you do not want all of the displayed records to be exported, you can use the [Filter](#) button to restrict which ones are displayed before you export them.

For exporting to Excel, you will want to select the "Excel" Data Format on the Save As Options window that comes up when you click **Save As**, with the "Raw Unformatted Data for Exporting" option also selected. For importing into other programs, often the correct Data Format will be either CSV (comma-separated value) or tab-separated Text.

Exporting to Excel with "Formatted Data for Display" is completely different and is unfortunately somewhat imperfect. Please see [here](#) for more details about that.

One additional exporting option uses the **Letters ⇒ Mass Mailing menu option**, where there is an option to only export the data needed for a given type of mail merge, rather than doing the mail merge within DONATION. That gives you another excellent way to export data, if for some unusual reason you need to do your own mail merges with your word processor. That window also has an option to [Filter](#) the retrieved data. You can then use the exported file for [Doing Mail Merges using Save As from Reports](#) or [Generating Mailing Labels using Microsoft Word](#). But usually the built-in [mail merge](#) and [mailing label](#) facilities in DONATION are far easier to use, and quite sufficient.




See also: [Saving Reports, Receipts and Letters as PDF Files](#)

## 17.9 Saving Reports, Receipts and Letters as PDF Files

Some users may wish to save reports, individual standard receipts (which are also really reports), and letters or receipts created with the **Letters** menu options, to PDF files. DONATION allows you to do that, so that those documents can be emailed to others in your organization, or the receipts' donors, as attachments.

### The Save PDF Options

To do this, for reports and individual standard receipts click the **Save PDF** button on the window, and for letters or receipts created with the **Letters** menu options, click the **Save PDF** toolbar icon () or use **File** ⇒ **Save PDF**. This will bring up a "Save PDF File As" dialog, in which you can both select a directory and specify a filename to save the PDF file as. Once you do that and click Save, it will take a moment to save the PDF, then display that PDF file for you in your standard PDF viewing application (usually the Adobe Reader).

Reports can also be saved to PDF with the **Save As** [button](#), which gives you some additional options like emailing the PDF version of the report to someone after it is created.

### Appending Multiple PDFs of Reports Together

When you use **Save PDF** or an equivalent option and the file you select to save to already exists, you are given three options: Replace Existing File, Append to Existing File, or Cancel Save.

The Append to Existing File option is only available for reports, not for receipts or any letters created with **Letters** menu options. This will prevent a danger of accidentally appending a PDF of one donor's receipt or letter to an existing PDF of a different donor's receipt or letter, and sending them both to one of those donors!

If you pick Replace Existing File, the previous file with that name will be deleted, and your save will then just include the current report, letter or receipt.

If you pick Append to Existing File, the contents of your current report or letter will be added as new page(s) at the end of whatever is currently in that PDF file. That would most commonly be used to get multiple reports into one PDF file.

### PDF Receipts are Encrypted

All PDF receipts (but not letters or reports) created by DONATION are securely encrypted, with a password that prevents them from being modified in any way unless you know that password, which we do not give out! (You don't need a password to view the PDF files.) If you plan to [email receipts as PDF attachments](#), please read the Help section on that for further concerns. (That section describes a way to email a batch of receipts, each to the relevant donor, which is **not** done using the methods described on this page.)

### The PDF Printer

The **Save PDF** options in various places in the program work in two different ways. For all reports, including the built-in (but not mail-merge) receipts, they are done by code internal to the program.

All mail-merge letters and receipts in versions other than the [OnDemand](#) version (which has its own internal way of doing this) instead use a "PDF Printer" that is installed with DONATION, called "novaPDF Pro v7 for DONATION". You can also select that printer to print to from other applications' Print dialog boxes (or even DONATION's normal Print dialog boxes). However, because the version installed with DONATION is only fully licensed for use with DONATION, it will print the following message at the bottom of every page, when you use it from other applications:

You created this PDF from an application that is not licensed to print to novaPDF printer (<http://www.novapdf.com>)

This message should normally not appear if you use the **Print** button in DONATION to print reports, receipts or letters.

However, there is another option for saving PDFs from mail-merge letters and receipts, which is that the program can invisibly use the Chrome web browser to do so, if you have a reasonably up-to-date version of it installed on your computer. That will be enabled if you have the "Use Chrome if possible to create PDFs from mail-merge documents" checkbox checked in the **Maintenance** ⇒ **Receipt Options** [window](#). (That checkbox is always checked in the OnDemand version, which does not have the novaPDF printer installed.)

The [OnDemand](#) version also has a printer called "Preview PDF (from *COMPUTERNAME*)", where *COMPUTERNAME* is replaced by the name of your local computer. We do not recommend using that, for reasons explained [here](#).

#### Purchasing a PDF printer for use with other applications

If you are finding the ability to print to PDF files from other applications helpful, you can indeed go to that novaPDF web site and purchase a full license to the software, so that you can use it from all applications on your computer that can print. As of early 2016, it has versions costing from \$29.95 to \$49.95.

There are a number other PDF Printer software products on the market as well. Here are a couple of these programs that we are aware of, with their prices as of early 2016:

1. PDF995, from [www.pdf995.com](http://www.pdf995.com). This has a free version, which however brings up an advertising page for the program in your web browser every time you use it, or an advertising-free version for only \$9.95.
2. PDF-XChange, from [www.docu-track.com](http://www.docu-track.com). This has a Lite version, for \$24, and a Standard version, for \$44, which has many more features, including stronger integration with Microsoft Office.

#### Uninstalling the novaPDF Printer Driver

If you have not purchased an individual license for the novaPDF printer driver, you may want to uninstall it, if you chose to uninstall DONATION. The DONATION uninstall program will

prompt you as to whether to uninstall the novaPDF printer. If you answer No to that and still want to uninstall it later, you can do that via Control Panel's Add or Remove Programs (or Programs) tool, choosing to Uninstall "novaPDF Pro v7 for DONATION (novaPDF 7.1 printer)".

#### Fixing a Broken novaPDF Printer Driver

If you start getting error messages when you try to create PDFs of mail-merge letters or receipts from within the program, you can use the **Tools** ⇒ **Fix novaPDF Problems** menu option to try to fix that. It downloads and runs a program that uninstalls then reinstalls the novaPDF printer driver. You can also get that program directly from the following web address: <https://www.software4nonprofits.com/files/newWindows/donationPDF.exe>.

## 17.10 Memorized Reports

DONATION can memorize both most built-in reports, and [Custom Reports](#) (or ones built directly with the **Database** ⇒ **SQL Select** [menu option](#)), for later re-use.

#### Memorizing Reports

This is done with the **Memorize** button on the report-viewing window, or the **Memorize Report** button on the SQL Select window. When you use **Memorize** from the report-viewing window, it also memorizes any custom [Sort](#) or [Filter](#) you have added to the report. When you then re-run this memorized report, that same Sort and/or Filter will be automatically re-applied.

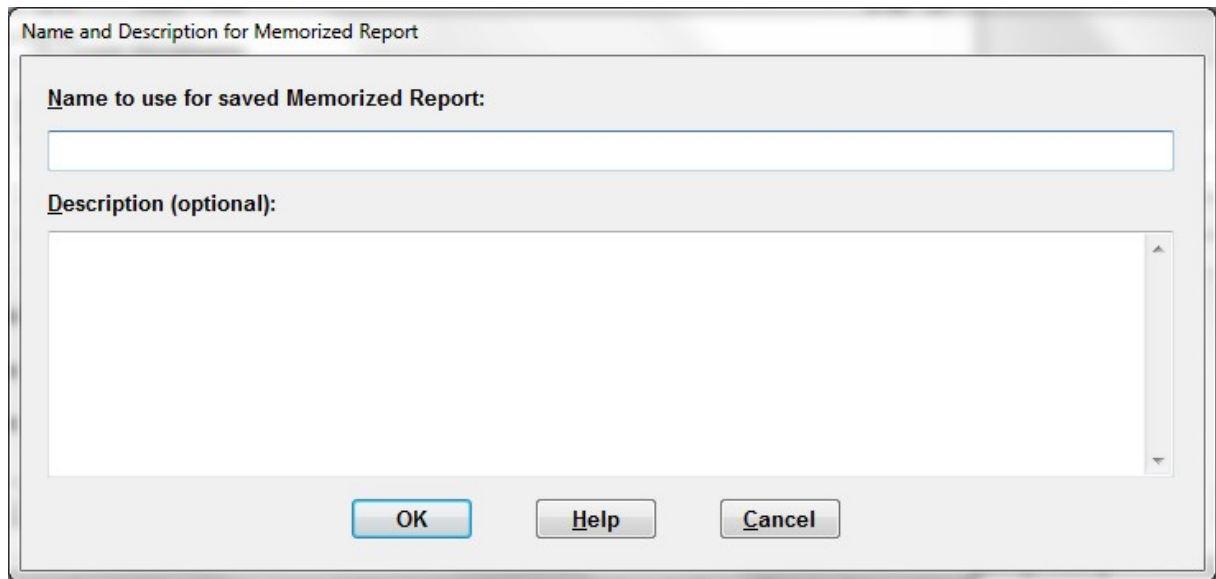
For built-in reports, memorizing the Sort and Filter is the main purpose of memorizing reports. And because of this, if a report does not allow for sorting or filtering, or you have not used either Sort or Filter, it will not allow itself to be memorized either, because there is nothing to gain from doing so.

For Custom Reports (or ones built directly with **Database** ⇒ **SQL Select**), the main purpose of memorizing them is to save having to re-create a custom report each time you use it. It also memorizes the selected Report Type (Normal or Grid), Orientation (Portrait or Landscape) and Report Title. And if you memorize such a report from the report-viewing window, again it also memorizes any custom Sort or Filter you have added.

When you memorize a report from the SQL Select window with the **Memorize Report** button, it first executes the SQL you have there, to make sure it is valid before saving it. If the report contains [arguments](#) for prompting for a date, range of dates, and/or a donation category, you will be prompted for sample values for those arguments as well, because without applying some arguments, it is not possible to tell whether your SQL is valid. Reports will not be memorized if the SQL is invalid, or it does not return any data.

Note: Any arguments that a report (custom or built-in) prompts you for will not be saved with the memorized report. You will be re-prompted for those arguments when you run the memorized report in the future.

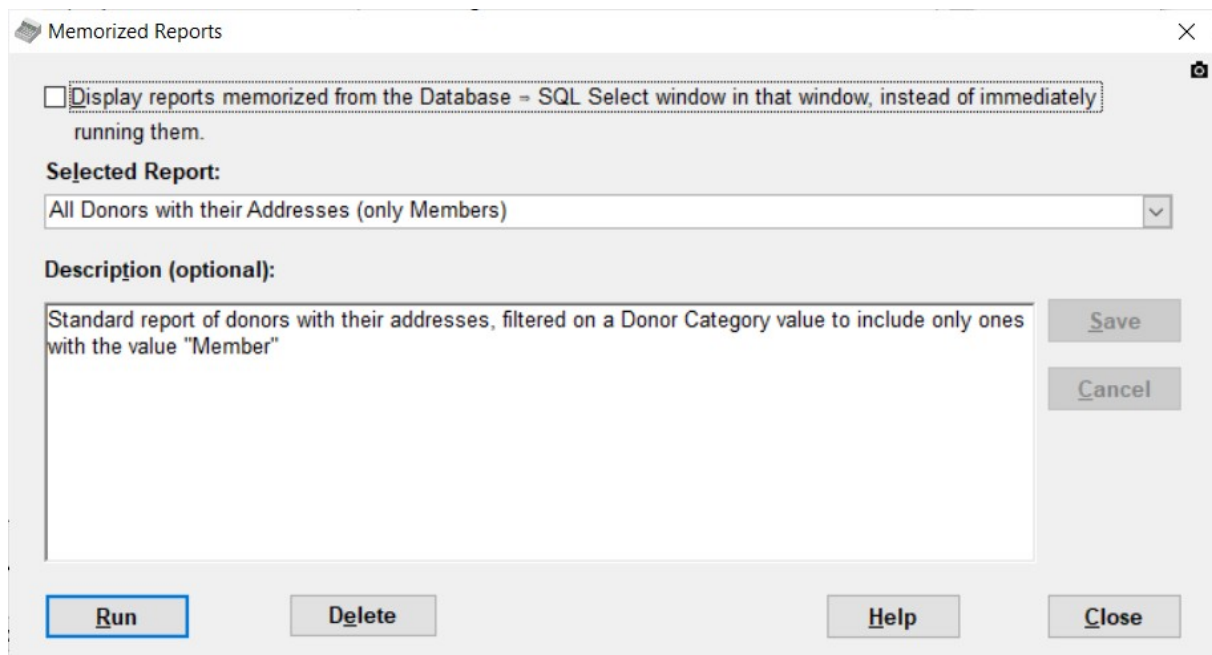
Either **Memorize** button will prompt you for a name to save the report as. Enter a name that will help you remember what the report is for. The window looks like this:

The image shows a dialog box titled "Name and Description for Memorized Report". It has a light gray background and a thin border. Inside the dialog, there are two main sections. The first section is labeled "Name to use for saved Memorized Report:" and contains a single-line text input field. The second section is labeled "Description (optional):" and contains a multi-line text area with a vertical scrollbar on the right side. At the bottom of the dialog, there are three buttons: "OK", "Help", and "Cancel". The "OK" button is highlighted with a blue border.

In some cases the **Memorize** button's Name and Description for Memorized Report window will show a suggested name. In particular, if you are replaying a previously memorized report, or have memorized the same report previously in the same session, the previously used name will be shown. For a previously memorized report with an existing Description, that will also be shown. If the report was not previously memorized, and the report has a title, a version of the title (with any characters that are illegal in filenames removed) will be used as the suggested name. You can of course change any suggested name to anything else that you want to use. One thing to be particularly careful of is not overwriting previously saved reports with a different report with the same name. The program does warn you if you are using the same name a second time, which gives you a chance to change your mind.

#### Re-running Memorized Reports

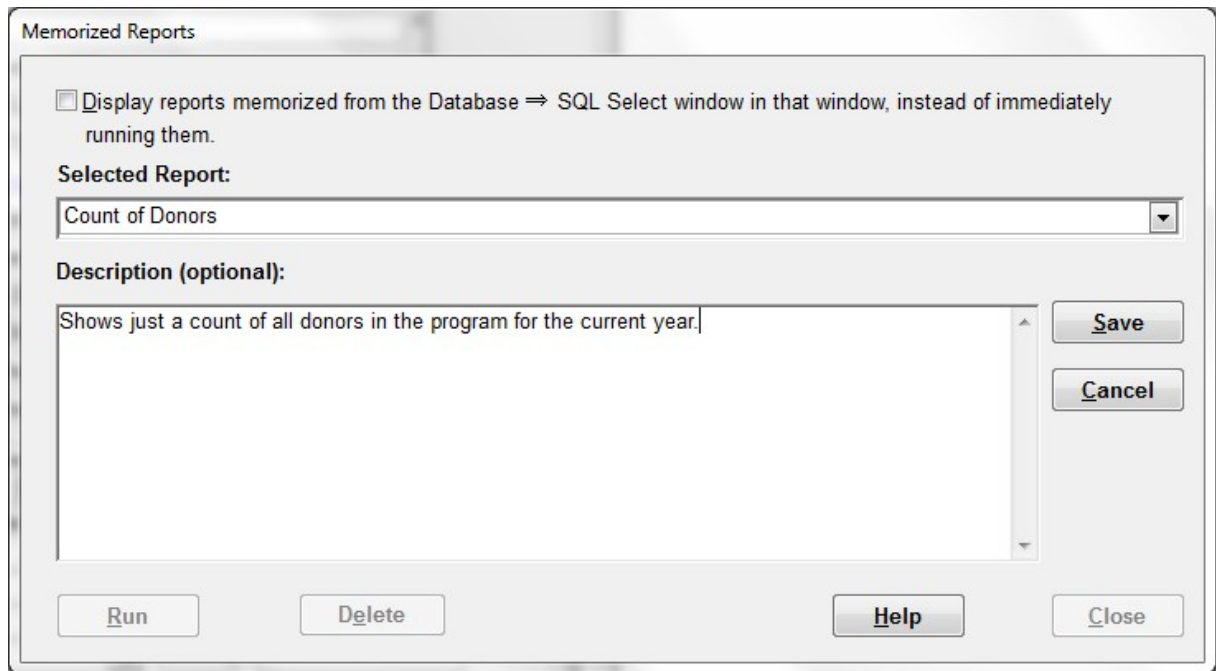
To re-run a previously memorized report, use the **Reports** ⇒ **Memorized Reports** menu option. That brings up the following window:



The normal usage is then to select the desired report from the Selected Report drop-down list, then click the default button, **Run**, or press **Enter** which does the same thing. As soon as you do that, any required arguments for the report will be prompted for, and then the report will be displayed in the normal report-viewing window. If it was saved with custom sorts or filters, they will also be executed.

If the report came from Custom Reports or the SQL Select window, rather than being a built-in report, and you wish to edit it further in the SQL Select window, check the checkbox at the top of this window ("Display reports memorized from the Database -> SQL Select window in that window ...") before selecting and running the report. It will then be displayed in that window, as you indicated. That would allow you to edit the SQL, Report Type, Orientation, and/or Title as desired before running it. (And if you do make changes, you might then want to re-memorize it, with the same or a different filename.)

You can also edit the Description of any memorized report on this window. Just click into the Description area and start typing. As soon as you do that, the **Save** and **Cancel** buttons become enabled (not greyed out), and all other buttons (and closing the window), except for **Help**, become disabled. So you have to either **Save** your change, or **Cancel** it or press **ESC** (which goes back to the unedited version). Here's a sample of what that version of the window looks like:



When you are finished with a memorized report in the reports-viewing or SQL Select window, you will be returned back to this Memorized Reports window. You can then run another memorized report, or close this window with the **Close** button or **ESC**.

If you find that you have a report that you no longer need in this database, after selecting it from the Selected Report drop-down list, you can click **Delete** to delete it (after a confirmation).

If you enter the program with the [Donors Only Password](#), the only reports displayed in the Selected Report drop-down list are ones that were memorized by a user who entered the program with the Donors Only Password.

#### Memorized Reports and Multiple Databases

If you have multiple databases for multiple organizations, and [switch databases](#), your memorized reports are specific to each database. If you need the same memorized report in multiple databases, you will have to re-create and memorize it in each one.

#### Backing up and Restoring Memorized Reports

Unlike versions of DONATION prior to version 3.66, current versions of DONATION store memorized reports in the program's database, rather than as separate files on your hard drive. As a result, when the database is shared by multiple users (either with the [Local Network Version](#) of DONATION, or when you backup and restore the database between multiple computers) the memorized reports automatically come with it. There is nothing further you need to do.

#### Using Reports Scripts for Memorized Reports

You can run memorized with automated [reports scripts](#). The `RunMemorizedReport()` command will be used, with the argument `Name=` and the name of the memorized report, as shown in the window for running them.

Additional arguments will match the arguments required for the built-in report that the report was memorized from, like `DateRange=` etc. if the report prompts for a range of dates. For Custom Reports, see [here](#) to learn about additional arguments.

## 17.11 Automated Report Running Scripts

Some users may have requirements to run a set of reports regularly, and do various things with them, such as print them, save them to specific formats, and/or email them. The **Reports** ⇒ **Run Reports Script** menu option gives you a way to do that.

The basic idea is that you write a fairly simple script in a text file, that you can create with a program like Notepad, with instructions for which reports you want to run, and what actions you want to do with them. The list of what we call "commands" that you can include in a script, which will be explained in detail below, are:

- `RunReport`
- `RunMemorizedReport`
- `FilterReport`
- `SortReport`
- `PrintReport`
- `SaveReport`
- `EmailReport`

A script could even be used just to save a few manual steps, for instance running one report, saving it to a desired format, and emailing it.

**Note:** For users entering the program with a Donors Only [password](#) or login, they can only run reports that don't show any donation data, so only those same reports will be available for them to successfully run in reports scripts.

### Creating Your Script

One easy way to create a script is to use the program's **Tools** ⇒ **Explore Data Directory** menu option, to open a File Explorer window in the program's [data directory](#). Once you are in that window, right-click in any blank area on the right-hand side of the window, and pick **New** from the popup menu, and then **Text Document**. That will create the file, with an initial name highlighted (up to ".txt") - just overtype that with what you want to name the file (such as `ReportScript`) and press **Enter** to save it. Be sure to leave in the required ".txt" extension in the name. Then you can right-click on your new file, and pick **Edit** from the popup menu to open it in your computer's default text file editor - usually the Notepad program.

For future edits of the same file, use **Tools** ⇒ **Explore Data Directory** again, find the file in the list there, right-click on it, and pick **Edit**.

### Basic File Format

Each command must be on one line. In Notepad, either lines will scroll to the right if you type beyond the end of the screen, or they will wrap and be displayed on the next line, depending



on whether there is a checkmark beside the sub-menu option **Format ⇒ Word Wrap**. Either way is fine, but be sure **not** to put an actual line break within one command's line, by pressing **Enter**, or your script won't work.

Each line is composed of one of the commands listed above (and explained in detail below), followed by parentheses (round brackets) and zero or more arguments within those parentheses, separated by commas, giving details of what to do. Arguments consist of a name of the argument, an equals sign, and a value. Here's an example:

```
RunMemorizedReport(Name=My Saved Report,DateRange=This Year)
```

Note that depending on the width of the window you are viewing this Help in, that command may show as being on one line, or wrapped onto two lines. That is just like in Notepad, if Word Wrap is turned on. But you have to make sure that each command is really only on one line!

You can include spaces around the various "punctuation" in the command line - the parentheses, equals signs, and commas - it is ignored. So the previous line could equally have been:

```
RunMemorizedReport ( Name = My Saved Report , DateRange = This  
Year )
```

One critical thing, however, is that if arguments themselves include commas, either the entire argument including its name, or just the part after the equals sign, must be in double-quotes. That will prevent the program from thinking that the comma indicates the start of the next argument! So if you have a memorized report named "Saved Report, Special Sort" the command to run it could be either of the following:

```
RunMemorizedReport(Name="Saved Report, Special Sort",  
DateRange=This Year)
```

or

```
RunMemorizedReport("Name=Saved Report, Special Sort",  
DateRange=This Year)
```

In the very unlikely case where the report name also has a double quote within it, and you are enclosing the entire name, equals sign and value in one set of double quotes, that double quote in the middle must be changed to be two double quotes.

Almost nothing in a reports script is case-sensitive, so you can use upper case, lower case, or mixed case (as we will use in most examples). Virtually the only exception to that is Filter and Sort argument values - which you will be able to copy out of specified places in the program, with the desired case.

For commands with multiple named arguments within the parentheses, the order that those arguments appear in is not important.

You can put "comments" on lines by having the first characters in the line be `"/`. You could use that either to explain what you are doing in a long complex script, or to eliminate a line that

currently isn't working. Two examples (with the 2nd being a line you have temporarily turned into a comment because it's not finished yet):

```
// this line is a comment that will be ignored
// RunReport(Name=not sure what the name is, DateRange=not sure
when I want to run this for yet!)
```

Entirely blank lines are also ignored.

There's one more special line you can use. When the program sees this line, it just stops reading your script file, so all further lines are ignored. You might use it while you were working on a long script, if only the initial part of your script so far was working, and you wanted to run the working lines at the top, and not bother adding "/" at the start of all of the following lines to make them be ignored. The special line is:

```
STOP
```

### Individual Command Formats

#### RunReport

The **Name** argument that you will use for any report in the RunReport command must be taken from what you see in **Reports ⇒ Report Browser**. Just separate each element that you see as you drill down in that window to select a report with a sort of fake arrow, "->" (a minus sign followed immediately by a greater than sign). After the Name argument, you can include arguments for whatever that report prompts for, such as a range of dates, a donation category, etc. So here's an example:

```
RunReport(Name=Donor Reports -> Donation Info -> Sort by Amount,
DateRange=This Year, Category=General)
```

The names of the specific arguments required for each report in the program are in the various Help topics for the Reports menu's sub-menus, starting [here](#). We have tried to keep them as similar as possible to what you see on the windows prompting for the options for each report, within limits.

When you are running reports through scripts, cases where a report does not display any rows of data, such as because there are no donations during a date range specified for the report, are **not** considered to be an error and do not stop the running of your script. In most cases, they will generate a report with just the headings, though for some reports, they could generate a completely empty page.

#### RunMemorizedReport

This is very similar to RunReport, except its **Name** argument is exactly what you see in the drop-down list in **Reports ⇒ Memorized Reports**.

There are two types of memorized reports:

1. Ones created by running a standard report, adding a sort or filter, then memorizing it, and

2. Ones created with **Reports ⇒ Custom Report** (or **Database ⇒ SQL Select**) and then memorized.

Memorized reports can also prompt for arguments, either the same arguments as the standard report they were memorized from, or the arguments prompted for by the custom report that were memorized, which will be based on in the Selection Criteria radio buttons that were chosen in the Custom Reports window. See [here](#) for more details on the arguments for Custom Reports.

When you are running memorized reports through scripts, cases where a report does not display any rows of data, such as because there are no donations during a date range specified for the report, are **not** considered to be an error and do not stop the running of your script. In most cases, they will generate a report with just the headings, though for some reports, they could generate a completely empty page.

### Date Ranges for Reports

Date ranges that many reports prompt for can be specified in one of two ways, with the **DateRange** argument, with various possible named values, like "This Year" as shown in the RunReport example above, or with **StartDate** and **EndDate** arguments, with specific dates for their values. The specific dates should be entered in your normal data-entry date format, as seen in donations on the main window. For instance, if your computer's dates are in the format MM/DD/YYYY, if you wanted to run that same report above for all of 2021, you could also use:

```
RunReport(Name=Donor Reports -> Donation Info -> Sort by Amount,
StartDate=01/01/2021, EndDate=12/31/2021, Category=General)
```

The date format YYYY-MM-DD is also always accepted.

In general, though, as long as there is a named **DateRange** argument that works for what you need, using that is preferable, because you won't have to keep editing the script to set the desired specific **StartDate** and **EndDate**, for instance when you are in the next year.

For reports that prompt for just a single date, the **Date** argument is used instead. It can be a named date (like "Today") or a specific date entered in your standard data entry format.

The following table lists and explains the available named **DateRange** arguments:

This Year	Your current working year in the program
This Fiscal Year	The current fiscal year that reports would be on (used if your fiscal year is different from the calendar year)
Last Month	The full last calendar month
Current Month to Date	The current calendar month, up to today
Last Quarter	The last quarter that has already passed, within the current working year
Last Fiscal Quarter	The last fiscal quarter that has already passed (used if your fiscal year is different from the calendar year)
Current Quarter to Date	The current quarter that you are within in the current working year, up to today
Current Fiscal Quarter to Date	The current fiscal quarter that you are within, up to today (used if your fiscal year is different from the calendar year)

Year to Date	The current working year in the program, up to today
Year to Last Month End	The current working year in the program, up to the last calendar month end
Fiscal Year to Last Month End	The current fiscal year that you are within, up to the last calendar month end (used if your fiscal year is different from the calendar year)
Year to Last Quarter End	The current working year in the program, up to the last quarter end
Fiscal Year to Last Fiscal Quarter End	The current fiscal year that you are within, up to the last fiscal quarter end (used if your fiscal year is different from the calendar year)

See below for details to help you understand the ones with "Fiscal" in their name.

The following table lists the available **Date** arguments for individual dates. They can also be used as the argument values for **DateRange**, if you want a report that prompts for a range of dates to include data from just a single date:

Today	Today's date
Yesterday	The day before today
Sunday	If today is a Sunday, then today. If today is any other day of the week, the most recent Sunday.
Monday, Tuesday ... Saturday	Same idea as Sunday - today's date if it's that day of the week, or the most recent day that is that day of the week.
Last Month End	The last calendar month end
Last Quarter End	The end day of the last quarter that has already passed, within the current working year
Last Fiscal Quarter End	The end day of the last fiscal quarter that has already passed (used if your fiscal year is different from the calendar year)

### Fiscal Years

There are actually two cases for fiscal years in DONATION.

1. Users in Canada or the U.S.A. always have their working year in the program being a calendar year, but can set a fiscal year in **Maintenance** ⇒ **Organization Info**. For those users, there is a FISCAL YEAR REPORTS section in the Report Browser (and Fiscal Year [sub-menu](#) in the main Reports menu). It would only be for those Fiscal Year reports that the **DateRange** and **Date** arguments that include the word "Fiscal" would normally be appropriate.

It's important to note that "This Fiscal Year" means the fiscal year which ends on a day in the current year, which may not include today's date! See [Fiscal Years in DONATION](#) for more details. Because of this, some of the named date ranges and named dates may not work if you are scripting Fiscal Year reports, and today's date is after the end of what the program considers to be the current fiscal year, because they will calculate out to date ranges that are not allowed.

2. Users in some other countries (we are specifically aware of Australia, New Zealand and England) have data-entry and receipting years different from the calendar years. In those countries, regular reports work on their fiscal years, and there are no special Fiscal Year

reports listed. In those cases, the regular named **DateRange** and **Date** arguments should be used, not the ones including the word "Fiscal", and they will automatically calculate the correct dates. See Using [Fiscal Year Data Entry and Receipting](#) for more details.

### Categories

Many reports also prompt for a donation category, and thus would have a `Category=` argument in their **RunReport** or **RunMemorizedReport** script line. That can be whatever is on the Category drop-down list seen when you run those reports, namely "All", or any of your donation categories.

### PrintReport

This command is simple, just:

```
PrintReport()
```

It always prints to your default printer, with no prompting. You must have done a **RunReport** or **RunMemorizedReport** before you can do a **PrintReport**.

### FilterReport

This allows you to add a Filter to the previous report that has been run with **RunReport** or **RunMemorizedReport**. In many cases this would not be necessary, because you could have instead memorized a report that already had your desired filter added, and used that.

Some cases where you would use this command would be when you don't want to bother memorizing a standard report, that you want to use in a script with a filter added, or cases when you want to run one report, then filter it in several different ways and then do things with those multiple filtered reports (like print them, save them, or email them).

The format is:

```
FilterReport(Criteria=...)
```

What you fill in to replace the "..." is the technical filter expression that you can see in the [Simple Filter](#) window's Output Filter Criteria area. You can also click the **Advanced** button in the Simple Filter window to get to the [Advanced Filter](#) window. In that window, the criteria are shown in the Filter Criteria editing area, and you can copy and paste out of there into your script.

Here's a simple example, for use following `RunReport(Name=Donor Reports -> Addresses)`. That report actually has a number of hidden fields that you can filter on, including the two donor Category fields, and the 6 Other Info fields. Suppose your Donor Category 1 has values including "Member" and you want to restrict that report to only the members. Use:

```
FilterReport(Criteria=(category1 = 'Member'))
```

In this example, although the Advanced Filter window that we copied the Criteria value out of put parentheses around the criteria that were pasted into this script line, they aren't necessary, so the following would also work:

```
FilterReport(Criteria=category1 = 'Member')
```

You will note that it's OK to have another equals sign in the value follow "Criteria=".

Here's a more complicated example, for use following `RunReport(Name=Donor Reports -> Addresses)`:

```
FilterReport(Criteria=(addr2 like '%Toronto%') Or (addr3 like '%Toronto%'))
```

That restricts the report to only people whose Address Line 2 or Address Line 3 contains "Toronto" within them.

### **SortReport**

Like **FilterReport**, this will often not be necessary, because you could have a memorized report that already had your desired sort added, and used that.

If you do need to use this for some reason, you will need to determine a technical sort expression to use in the script command.

To do that, first run the report normally, and use the **Sort** button and [sort window](#) to specify your desired sort order. Then click the **Details ...** button in that window. That will display the internal technical sort expression used in the program, which is also used in the script command. It also copies it into the Windows clipboard, so you can then paste it into a script that you are editing, with **Ctrl+V**.

To repeat the example from the [sort window](#) Help topic, suppose we are running the **Reports** ⇒ **Donation** ⇒ **All Donations** ⇒ **Sort by Name** report, using `RunReport(Name=Donation Reports -> All Donations -> Sort by Name, DateRange=... Category=...)` and we want to change it to be sorted by Amount. Make that change in the sort widow as described in that Help topic, then in that window click **Details ...**, which will put the desired sort order into the clipboard, allowing you to complete this script line:

```
SortReport(Order="amount A, reversed_name A, date_received A, category A")
```

### **SaveReport**

This command allows you to save the report to one of several file formats. The general form of it is:

```
SaveReport(Type=..., Filename=...)
```

The **Type** can be:

- **PDF:** probably the most common option, creates a formatted PDF file, just like the reports window's **Save PDF** button. Filenames used with this must end in ".pdf".
- **Excel:** saves to formatted Excel, as can be done with the reports window's **Save As** button. Filenames used with this must end in ".xls".
- **Text:** the report's unformatted data, in a tab-separated text file, as can be done with the reports window's **Save As** button. Filenames used with this must end in ".txt".
- **CSV:** the report's unformatted data, in a comma-separated value text file, as can be done with the reports window's **Save As** button. Filenames used with this must end in ".csv".

The files are always saved into the Export subdirectory of your program's [Data Directory](#). As a result, the **Filename** argument must be just that: only a file name, with no drive or path (directory) component. So here's an example

```
SaveReport (Type=PDF, Filename=MyReport.pdf)
```

A **SaveReport** command with **Type=PDF** has three additional optional arguments:

1. **Password:** If you provide this, users trying to open the saved file will have to provide exactly that password (case-sensitive) in order to successfully open it. Here's an example:

```
SaveReport (Type=PDF, Filename=MyReport.pdf, Password=OpenSesame)
```

2. **Open:** If you include `Open=Y`, the PDF will be opened in your usual PDF-viewing application (likely Adobe Acrobat Reader). That program will actually cover DONATION until you close it. Example:

```
SaveReport (Type=PDF, Filename=MyReport.pdf, Open=Y)
```

Our thought is that this argument would usually only be used when you were testing a script, to see the results of running the report you are working on. You would likely remove it before you start using the script regularly, since you would just want the actions in the commands to happen, with no need to see any PDFs yourself.

**Warning:** Don't include a 2nd `SaveReport` commands that saves to the same `Filename` when a report has already been saved to that same file with `Open=Y` in the same script. The PDF-viewing application will "lock" the file once the first one has been opened and displayed in it, and the 2nd save will then not succeed. The program can't necessarily detect this well, so the messaging when this happens may be confusing.

3. **Append:** If you include `Append=Y`, and the PDF file in the Data Directory's Export subdirectory named by the value of the `Filename` argument already exists, the PDF from the last-saved report will be appended to (added to the end of) that existing PDF.

**Warning:** It only makes sense to use this in a script that has multiple `SaveReport` command with `Type=PDF` to the same `Filename` value. Be sure to omit `Append`, or use `Append=N`, in the first `SaveReport` command for that filename, or it might be appending to an existing file from a previous run of the same reports script! Also be sure not to also use `Open=Y` with this, or only use it on the very last `SaveReport` with that filename, or the previous ones will fail, as mentioned above in the section for `Open`.

**Warning about Passwords:** If you are using the `Password` argument, both the earlier file



with this `Filename` value and this file with the same `Filename` value and `Append=Y` must have the same password, or you will get errors, and the appending will not work.

### **EmailReport**

This command allows you to email a report saved with **SaveReport** to anyone you wish. You have to have first successfully configured emailing in the program, with the **Maintenance** ⇒ **Email Sending Configuration** [window](#), before you can use this command in a script.

If you have not included a `SaveReport` command in your script, following the last `RunReport` or `RunMemorizedReport`, before an `EmailReport` command appears, it will not be allowed. That's because there is nothing saved from that last report you ran that can be emailed! The last file saved with `SaveReport` is always attached to the email.

The format of this command is one of two options:

```
EmailReport(toName=..., toEmail=..., Subject=..., Body=...)
```

or

```
EmailReport(toName=..., toEmail=..., Subject=..., BodyFilename=...)
```

The first 3 arguments should be quite obvious - the name and email address of the person to send the last-saved report to, and the Subject line for the email.

You can use the **Body** argument to include a short message within the script line, that will be the body of the email. You can actually include newlines within that argument, by using the HTML code "<br>" or "<BR>". To have a blank line between two parts of your message, use two of them, like this:

```
EmailReport(toName=Robbie Recipient, toEmail=robbie@recipients.com,  
Subject=Your Special Report, Body="Here is your special  
report.<br><br>Sincerely,<br>John Smith")
```

The body of the resulting email would be like this:

Here is your special report.

Sincerely,  
John Smith

For longer email bodies, write them in a text file, with a filename ending in ".txt", which you can do with Notepad just like how you created your script file. Then instead of the **Body** argument, use **BodyFilename** to give the full drive, path and filename to find that file. (This is unlike the **Filename** argument to **SaveReport**, which is just the actual name.) Here's an example:

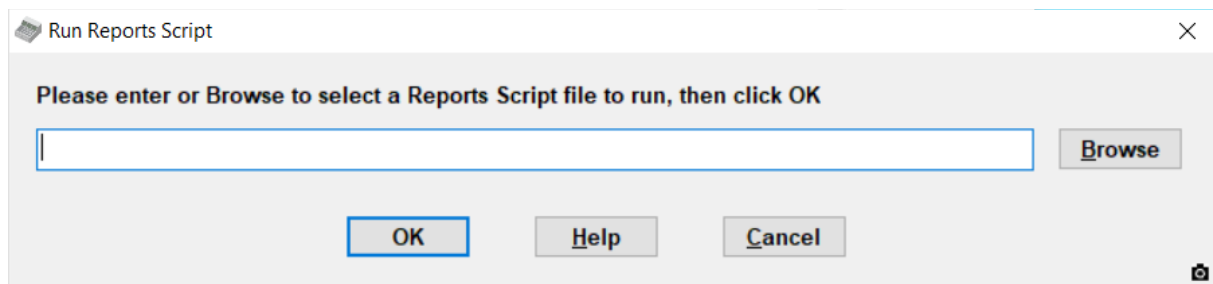
```
EmailReport(toName=Robbie Recipient, toEmail=robbie@recipients.com,  
Subject=Your Special Report,  
BodyFilename="C:\users\dan\documents\MyEmailBody.txt")
```

There are two more optional arguments you can use with `EmailReport:CCyourself` and `BCCyourself`. Both have values Y or N, and if you set them to Y, the email that is sent will be Cc'd or Bcc'd to your email address as specified in the Email Sending Configuration [window](#). (There is no need to ever include those arguments with the value N, since that is the same as not including those arguments.)

The emails are always sent with the From name and email address that are specified in the Email Sending Configuration window. One exception to that is if you have checked the checkbox for "Email receipts, letters and statements only to yourself for testing" in the [Receipt Options](#) window. In that case, the `ToEmail` is always set to be the same as the From email address from the Email Sending Configuration window, and any settings of `CCyourself` or `BCCyourself` are ignored (so you don't get multiple copies!).

### Running your Script

To run the script once you have written it, use **Reports = Run Reports Script**. That will bring up a window such as the following:



You can type in a full path to your script file in the entry field, or use the **Browse** button to bring up a File Open dialog in which you can find and select it.

Once you have clicked **OK** in this window once, the name of the script file is memorized and re-displayed for you the next time you use the window.

The script file must have a name ending in ".txt".

When you click **OK**, first the script will be read, and if there are any errors in its formatting etc., the first such error will be displayed to you, and the processing will stop. You will want to switch back and forth between this window and your text editor program in which you are editing the script (usually Notepad), for instance by clicking on the appropriate icon in the Windows Taskbar at the bottom of your screen, to fix errors and keep trying until it works.

Once there are no script formatting errors, the program will attempt to follow the commands in the script, one by one. There can be additional errors found at this point, for instance missing or incorrect arguments to **RunReport** or **RunMemorizedReport**, etc. Again, the processing will stop at the first such error.

As mentioned above, reports that do not display any data, for instance because there is no matching information within a date range that you specify, are not considered to be errors, and will not pop up messages. In most cases, they will generate a report with just the headings, though for some reports, they could generate a completely empty page.

Please read any error messages that come up carefully, and try to understand them. We have tried to make them as clear as possible to help you fix things without needing to wait for help from us!

You will probably want to build your scripts up slowly, one line at a time, to make sure that each line works, before you go on to the next line.

If a whole script runs successfully, you will get a message to that effect.

During the running of the script, you will see the reports window displayed, with any report that has been run showing on it. When the script is finished and you have clicked OK on any messages that came up (either errors, or the message saying it finished successfully), the reports window will close.

The window above that prompts for your filename only closes if you click **Cancel**, or you click **OK** and everything is successful.

### Some Complete Examples

For a first example, suppose after every month-end you want to quickly just print off both **Reports ⇒ Donation ⇒ Summary by Category** and **Reports ⇒ Donation ⇒ Summary by Paid By** for the preceding month. Remembering that we have to use the naming from the Report Browser (so instead of "Donation" it is "Donation Reports"), our script could be:

```
RunReport(Name=Donation Reports -> Summary by Category,  
DateRange=Last Month)  
PrintReport()  
RunReport(Name=Donation Reports -> Summary by Paid By,  
DateRange=Last Month)  
PrintReport()
```

Now let's do one that's a bit more complicated.

Suppose you have a Custom Report for reporting on one day's donations, with columns for the Name, Category 1 (which is whether they are a Member etc.), donation Category and Sum(Total Amount), so you can see the totals by category for that date, broken out by the donor Category 1 values. That report would prompt for just a date. It is a memorized report named "Special Daily Totals".

Let's also assume that you have given the name "Membership" to the donor Category 1 field, with an option on the [Donor Details](#) tab of **Maintenance ⇒ Main Window Options**, so that is the name it will appear with on the report, and the name you would use for filtering.

It's for a church's Sunday collection, and you might run it on that same day, or maybe within the next few days.

You want to email versions of that report, for one Category 1 value each, to different people. Here's your script:

```

RunMemorizedReport(Name=Special Daily Totals, Date=Sunday)
FilterReport(Criteria=membership = 'Member')
SaveReport(Type=PDF, Filename="MembersDaily.pdf")
EmailReport(toName=Mary Membership,
toEmail=marymembership@yourorg.com, Subject=Sunday's Membership
Totals, Body="Here is your report of totals by category for only
Members, Mary")
FilterReport(Criteria=membership = 'Non-Member')
SaveReport(Type=PDF, Filename="NonMembersDaily.pdf")
EmailReport(toName=Norman Nonmember, toEmail=normnon@yourorg.com,
Subject=Sunday's Non-Membership Totals, Body="Here is your report
of totals by category for only Non-Members, Norman")
// you could include more filters for different membership values
here and more commands to email them to people

```

As always, make sure that each command is really only on one line, not broken up as the longer lines above might appear to be!

## 17.12 Loading SQL for Reports

In very unusual circumstances, you may need to do something special with an existing report that cannot be done with a different built-in report, the [Sort](#) or [Filter](#) buttons, or [Custom Reports](#). Please [contact us](#) for support, and explain exactly which report (which menu option) you are looking at, and how you need it to be different. We will tell you whether there is a way to get what you want.

One way that this can be done is to use a modified version of the SQL (the database language for selecting the data for reports) with an existing built-in report. To do that, you start by saving its SQL to a file with the **Save SQL** button on the report-viewing window. You can then edit that SQL if you know how, or ask us for assistance with it. (Complex report changes of this type are **not** part of our normal support, and we may require you to pay us at an hourly rate for our time if we do not feel it can be done very quickly.)


The modified version of the SQL can then be loaded in with the **Load SQL** button on the report-viewing window. The only changes that will work are ones that maintain the exact same list of fields being retrieved - adding or removing fields, or changing the order of the fields, will cause this to fail with techie error messages under the heading "Data Entry Error".

Not all reports' SQL can be successfully saved, edited and re-loaded, but it should work for most built-in reports.

Changes to a report made with the **Load SQL** button can also be memorized by the **Memorize** button for [memorizing reports](#). That way, rather than having to run the report normally and then use the **Load SQL** button to load the modified SQL file each time, you can memorize the report once after using **Load SQL**, and then replay it in the future with **Reports ⇒ Memorized Reports**.

## 17.13 Dollar Ranges for Summary Report

When you run **Reports ⇒ Donation ⇒ Summary by Dollar Ranges**, you are first prompted for a range of dates and an optional donation category to run the report for, then after that the following window comes up:

 Dollar Ranges for Summary Report ✕

From		To
0.01	-	\$50.00
\$50.01	-	\$100.00
\$100.01	-	\$200.00
\$200.01	-	\$300.00
\$300.01	-	\$400.00
\$400.01	-	\$500.00
\$500.01	-	\$600.00
\$600.01	-	\$700.00
\$700.01	-	\$800.00
\$800.01	-	\$900.00
\$900.01	-	\$1,000.00
\$1,000.01	-	\$1,500.00
\$1,500.01	-	\$2,000.00
\$2,000.01	-	\$3,000.00
\$3,000.01	-	\$4,000.00
\$4,000.01	-	\$5,000.00
\$5,000.01	-	\$6,000.00
\$6,000.01	-	\$7,000.00
\$7,000.01	-	\$8,000.00
\$8,000.01	-	\$9,000.00
\$9,000.01	-	\$10,000.00
\$10,000.01	-	

**OK**

**Help**

**Cancel**

This window allows you to change the dollar ranges that will appear in the report. (Only dollar ranges for which there are donors whose total donations in the current working year or the prior working year are in that range will appear in the report.)

On each row, the **From** value at the left is editable. The **To** value at the right is calculated, as one cent less than the next row's From value, and not editable.

You can make changes in various ways:

- Deleting a **From** value (if you don't want that one to be used). It's OK to leave blank rows.
- Changing **From** values
- Adding additional **From** values in an empty row that is always available at the bottom of the list. Once you fill in that empty row and press **Tab** or otherwise move out of the field, another empty row will appear.

The **From** values do not actually have to be in increasing order - when you click **OK** to save them, they will be re-sorted into increasing order. One minor thing to note is that if you enter **From** values that are **not** in increasing order, the **To** value on the line prior to them will appear to be incorrect, but don't worry, again, that will be fixed when you click **OK**.

Clicking **OK** first validates your entries, then if they are OK, runs the report with those ranges. The ranges are memorized for subsequent runs of this same report by any user using the same database, and redisplayed whenever the report is run.

Clicking **Cancel** cancels any changes and stops the report from running. Clicking **Help** brings up this help page.

## 18 CREATING MAIL MERGE LETTERS

### 18.1 Creating Mail Merge Letters

There are three different ways to create mail merge letters using DONATION. A mail merge letter is a document created with DONATION's internal editor (or in some cases your normal word processing program, generally Microsoft Word or WordPerfect) that has information from the DONATION program's data (Donor, Donation, Pledge and/or Receipt information) included in (merged into) it.

We call the document that has mail merge fields in it, to be filled in with specific information, a template file. After the mail merge has been done using that template, we call the result a merged file.

The first way, using **Letters** ⇒ **One Letter**, takes information from one Donor, and optionally information from one or more of that donor's donations or one receipt, and merges it into a letter or receipt document.

The second way, using **Letters** ⇒ **Mass Mailing**, takes information from all Donors, and optionally information from their donations or receipts, and merges it into a set of letters or receipt documents, one per donor, donation, or receipt. You can also filter the data so only some donors, donations or receipts are included.

The third way, which in general is the hardest and most limiting to use, uses the **Save As** button on any report viewing window to save the data from a report to a file. You then have to use that data yourself, with your word processor's mail merge capabilities to create a letter. It is the most complex of the methods and should almost never be required. (See [Doing Mail Merges using Save As from Reports](#) for details.)

One major benefit of mail merge is that if you do not like the built-in receipt format generated by the program, or want to add something to it, you can instead generate the receipts in your own edited format. In fact, if you switch to using mail merge for receipts in the **Maintenance** ⇒ **Receipt Options** [window](#), then any receipts generated normally with the **Receipt** [menu](#) options will use your mail-merge template.

If you are going to use either of the **Letters** menu options, please read about the One Donor option first (the first link below), because the Mass Mailings option builds on that. And please read both of those pages before reading about generating receipts using mail merge.

[Creating Letters for One Donor](#)

[Creating Mass Mailings](#)

[Mail Merge Fields](#)

[Editing with the Internal Editor](#)

[Generating Receipts Using Mail Merge](#)

[Generating Mailing Labels using Mass Mailings](#)

[Doing Mail Merges using Save As from Reports](#)

There are also several training videos on Mail Merge letters and receipts on the [Demos and Samples](#) web page, if you would prefer to see these features demonstrated live, rather than reading about them. Of course, there are a lot more details in these Help pages than in the videos.



## 18.2 Creating Letters for One Donor

Please first read [Creating Mail Merge Letters](#) for an overview of these features.

Using **Letters** ⇒ **One Letter**, you can create one letter for the current Donor. It can include just Donor information, or also include information on the current donation for that donor (the one with the pointing hand symbol beside it on the main window), on the total donations (and optionally list of donations) for a range of dates for that donor, on the pledge and donations made to fulfill that pledge for the donor, or on the currently selected receipt for that donor, or in some cases for Canadian users for the selected Gift in Kind receipt for that donor. (A receipt is considered to be selected if the current donation for the donor on the main window is part of that receipt, i.e. shows that Receipt #.)

More details on the types of letter available are listed in the Help topic on [Creating Mass Mailings](#). The only difference between the lists of types of letter in these two options are that for **Letters** ⇒ **One Letter**, the 2nd option is for the current donation that you have clicking into on the main window, whereas for **Letters** ⇒ **Mass Mailing**, the 2nd option is for sending individual letters for each donation made within a prompted-for range of dates.

If you enter the program with the [Donors Only Password](#), only the Donor Information Only type of letters are available, and the donor fields related to donation amounts are removed.

There are several training videos on Mail Merge letters and receipts on the [Demos and Samples](#) web page, if you would prefer to see these features demonstrated live, rather than reading about them.

Before you can use this feature the first time, you will want to create or modify a template letter file that will form the basis of the letter. A number of sample letters and receipt templates are provided that you can modify for your use. They are stored in the database, and extracted to the Letters subdirectory under the program's [Data Directory](#) when you actually use them. The following are the names of the standard sample letters provided with DONATION, which are by default used for both **Letters** ⇒ **One Letter** and **Letters** ⇒ **Mass Mailing**:

<u>Type of Information</u>	<u>Letter Name</u>
<b>Donor Information only</b>	donors_merge
<b>Current Donation Information</b>	donations_merge
<b>Total Donations Information</b>	donationTotals_merge
<b>Pledge Information</b> - name depends on your pledge type settings in the <a href="#">Pledges tab</a> of <b>Maintenance</b> ⇒ <b>Main Window Options</b> :	
For Simple Annual Pledge	pledges_simple_merge
For Annual with Start Date and Category	pledges_with_category_merge
For Multi-Year	pledges_multi_year_merge
<b>Selected Receipt Information</b> - name depends on your "Receipt Style / Location" <a href="#">setting</a> in <b>Maintenance</b> ⇒ <b>Receipt Options</b> :	
For Canada (English)	receipts_merge_canada
For Quebec (bilingual)	receipts_merge_bilingual
For Quebec (French only)	receipts_merge_french
For U.S.A.	receipts_merge_usa
For Australia (DGR)	receipts_merge_aus_dgr

For Australia (non-DGR)    receipts\_merge\_aus\_other  
For New Zealand            receipts\_merge\_new\_zealand  
For Other countries        receipts\_merge\_other

**Gift in Kind Receipt Information** - name depends on your "Receipt Style / Location" setting in **Maintenance** ⇒ **Receipt Options**. Only applies to Canadian options.

For Canada                    receipts\_gik\_merge\_canada  
For Quebec (bilingual)    receipts\_gik\_merge\_bilingual  
For Quebec (French only)   receipts\_gik\_merge\_french

The files are stored and edited as HTML files, the type that are used for web pages. This is actually a very good "common denominator" file format, that works well for doing mail merge letters or receipts, and can also be handled by most word processing programs.

You select the Type of Information using the radio buttons at the top left of the Merge One Letter window that comes up when you select **Letters** ⇒ **One Letter** (as shown below). After making that selection, the merge fields available for that type of letter are shown in a list box at the top right of the window. You can't do anything with that Merge Fields list - it's just for your information.

Here is a screenshot of the Merge One Letter window:

**Merge One Letter**

1. Select the type of information you want to be merged into this letter for the current selected donor. This will determine the merge fields which can be included in it, which are displayed in the list on the right.

☒ Donor Information only  
☐ Current Donation Information  
☐ Total Donations Information  
☐ Pledge Information  
☐ Selected Receipt Information  
☐ Gift in Kind Receipt Information

**Merge Fields:**

- OrgName
- OrgName2
- OrgAddress1
- OrgAddress2
- OrgAddress3
- OrgPhone
- SignatoryName
- MemberEnvNum

☐ With Advantage

2. Select the desired letter with merge codes (as listed above) in it.

☒ I want to use standard names based on the type of letter selected in step 1.

Letter:

☐ Show Advanced Actions:

3. Specify whether you want to be given a chance to select only a filtered selection of the retrieved donation information.

☐ I want to filter the donation information before doing the merge.

**Notes:** The radio button in section 1 of this window, "Pledge Information", does not appear if you have selected to not show the Annual Pledge field in the Donor Details tab of the **Maintenance** ⇒ **Main Window Options** [window](#). And the radio button "Gift in Kind Receipt Information" only appears if you are in Canada. (See [Handling Gifts in Kind](#) for more information.)

Section 3 of this window, which is shown greyed out (disabled) in the image above, becomes enabled only when you select "Total Donations Information" in Section 1. See [below](#) for information on using it.

### Type of Information Options

The following are the options for Type of Information in the Merge One Letter window that comes up when you use **Letters** ⇒ **One Letter**:

#### **Donor Information only**

Creates one letter for the currently displayed donor on the main widow, which can include limited summary financial information for them for the whole year, like TotalAmount, their total givings.

- Current Donation Information** For this option, you must have clicked on a donation row on the main window first, and the letter can then include fields with the details of that donor and that donation.
- Total Donations Information** Prompts for a range of dates when you click **Merge**, then the letter can include details of the current donor and their donations within that range of dates, both total donations information and details. Letters for this option can include the «DetailsTable» and «SummaryTable» merge fields, giving details or summary by category information on the donations included in the totals.
- Pledge Information** Creates a letter about the current donor's pledge, with different default letters being used (and different merge fields being available) for the different pledge types, set in the [Pledges tab](#) of the **Maintenance ⇒ Main Window Options** window. No date range is prompted for with this option - it always reports on the entire pledge period, or the entire fiscal year, if you select the option on that window for pledges to be on a fiscal year basis.
- Letters for this option can include the «DetailsTable» merge field, which gives details of the donations during the current year (or fiscal year) that are considered to be fulfilling the pledge.
- When you have selected the Annual with Start Date and Category pledge type, one additional special table field is provided: «DetailsTableAllCategories», which lists all donations regardless of their donation category, or whether they go towards fulfilling the pledge.
- When you have selected the Multi-Year pledge type, two additional special table fields are provided: «DetailsTableAllYears», which lists all donations that fulfill the pledge over the entire range of dates within the multi-year pledge, and «PledgeYearsTable», which lists the donor's year-by-year pledge amounts.
- Note: This option is removed if you have selected not to display the Annual Pledge field on the [Donor tab](#) of the **Maintenance ⇒ Main Window Options** window.
- Selected Receipt Information** For this option, you must have clicked on a donation row on the main window first, that already has a Recpt # filled in, because a receipt has been created for it with one of the **Receipt** menu options. The letter then uses the information in that receipt. Letters for this option can also include the «DetailsTable» and «SummaryTable» merge fields, giving details or summary by category information on the donations included in the receipt. This option can be used either after [Generating Receipts Using Mail Merge](#), or even

if you generate the regular [built-in receipts](#), and subsequently want to create separate cover letters to go with those receipts. (However, you can instead add a cover letter to the standard template you are using for the receipts, so that this does not have to be done separately.)

**You cannot create new receipts with this option, only reprint existing ones or create letters based on their existing information.**

**Gift in Kind Receipt Information** This only appears if you are in Canada. It is like **Selected Receipt Information**, but only processes special [gift in kind](#) receipts. It also does not support the «DetailsTable» or «SummaryTable» merge fields, because a gift in kind receipt is always only for one donation, and the details of that donation are available in the merge fields.

**You cannot create new receipts with this option, only reprint existing ones or create letters based on their existing information.**

When ranges of dates are involved, as in the Total Donations Information letters, or the TotalAmount (which is for the whole year) in the Donor Information letters, the current working year in the program is used. If you are in a country such as the United Kingdom, Australia or New Zealand, and have selected to use [Fiscal Year Data Entry and Receipting](#), and are working on a fiscal year, that is the range of dates that is available.

The "With Advantage" checkbox shown in the above image of the window is only present for Canadian users, and is only relevant for Selected Receipt Information or Gift in Kind Receipt Information merges. Selecting it means that the filenames of the default mail-merge documents used have "\_adv\_desc" added - for instance "receipts\_merge\_canada\_adv\_desc" for Canadian English receipts, instead of just "receipts\_merge\_canada". See [Donations and Receipts with Advantage](#) for details.

### **Editing the Initial Template Letter and Receipt Files**

To edit a sample letter, once you are in the Merge One Letter window (after selecting **Letters** ⇒ **One Letter**), select the radio button at the top left for the Type of Information you want included in the letter (options as listed in the table above). Make sure that the checkbox for using standard names for the Letter is checked, which causes the standard name above to be shown for the Letter. (Note: You can't select a different name, unless you uncheck the checkbox.)

Then if you click the **Edit** button just to the right of the Letter name, you will be put into the internal editor window, viewing that letter. You will see that there are special placeholders (called "merge fields") where the merged in information will go. For instance, «Name» will be replaced by the business name of the donor if there is one, or otherwise the full name (First Name plus Last Name). Each field that can be replaced has a specific name, and each name is preceded by « and followed by ». There is a drop-down list of the insertable fields on the editor window, and an Insert button beside the list that inserts the currently selected field on the list into the document, at the current cursor position.

For more details on the [internal editor](#) and the [mail merge fields](#) available for each type of letter, follow the links earlier in this sentence.

All of the sample template letters and receipts include any logo bitmap you have specified in the Logo and Signatures [window](#), in the top-right corner of the letter. The sample receipts also include any signature bitmap you specified in that window, above the signature line.

Both the Total Donations Information and Selected Receipt Information types of merge letter have two special merge fields available to them, «DetailsTable» and «SummaryTable». The [Details Table](#) generates a table of individual donation details, either for all donations within a selected date range for the Total Donations Information option, or for all donations included in the receipt for the Selected Receipt Information option. The Summary Table generates a summary by category of donation, for the same sets of donations.

The Pledge Information letters also have the «DetailsTable» merge field available, although its details are slightly different than in the other types of letter that include it. Pledge letters do not support the «SummaryTable» field, because usually pledges are for only one donation category, so a summary by category section would not be needed. If you are using the pledge type Annual with Start Date and Category, one additional special merge field is available: «DetailsTableAllCategories». If you are using the pledge type Multi-Year, two further special merge fields are available, «DetailsTableAllYears» and «PledgeYearsTable». Please also see [Pledges in DONATION](#) for further details on using mail-merge letters for pledge information.

Full details on all of these special fields (and all other mail merge fields) are in the Help topic on [mail merge fields](#).

**Note to French Speakers:** If you use « and » as quotation marks in your documents, there is a potential problem with quoted text being seen as merge fields, and causing errors in merges. However, as long as your quotation includes at least one space, it will be ignored, so hopefully this will not be a problem.

When you are satisfied with any changes that you wish to make to the sample letter, use **File** ⇒ **Save** in the editor to save your changes, then exit that editor window to come back to the Merge One Letter window.

Normally you only have to edit these files the first time you use them, unless or until you decide you want to change their wording again.

There is a separate section on [Generating Receipts using Mail Merge](#) which says a lot more about the sample Receipt Information letters.

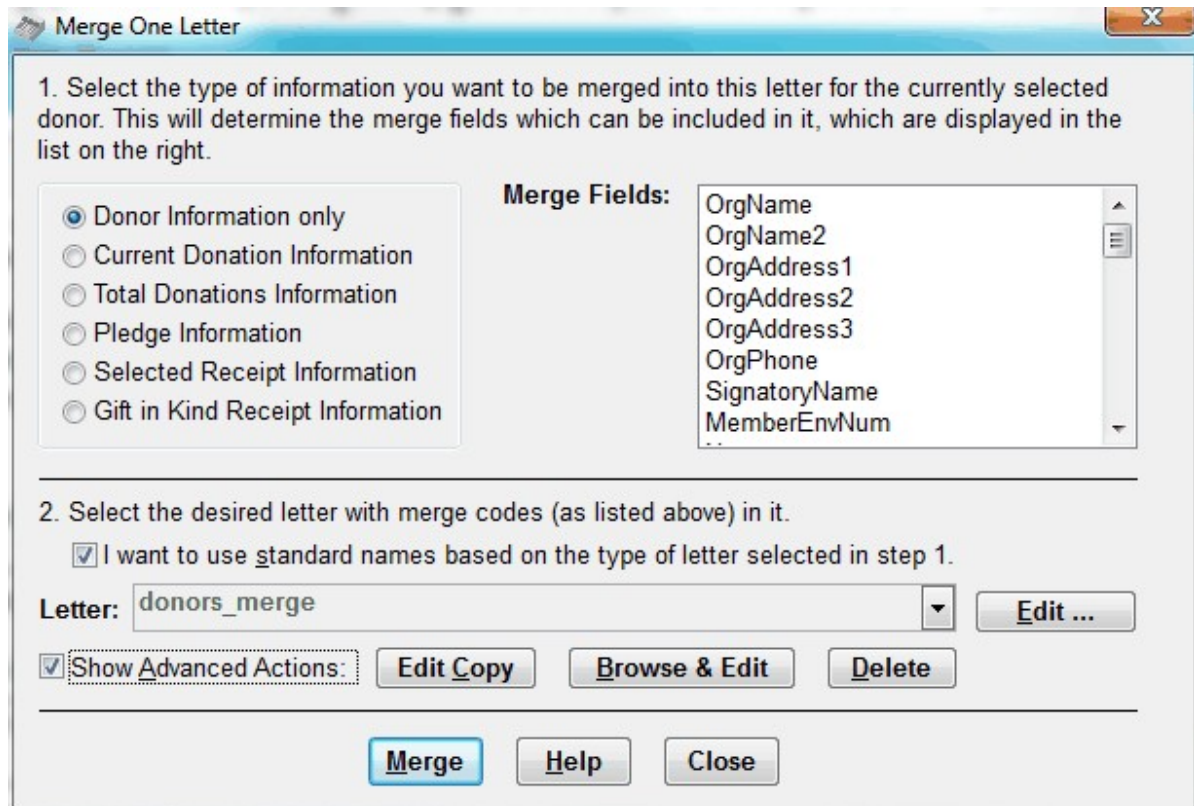
### **Selecting Letter Names**

Unless you need multiple letters with varying wording for each type of information (for example for Donor Information letters), we recommend that you just use the standard named sample letter files, with their contents edited as desired. That way, you don't have to remember the names, because the program brings them up automatically.

If you do want to select a different name for the Letter, however, uncheck the checkbox for using standard names, and select the name from the drop-down Letters list (if it is already there).



There are some other options though, which require you to check the "Show Advanced Actions" checkbox, which displays three additional buttons to its right, as follows:



If you have an existing template letter, but want another one for the same type of information (for example Donor Information), perhaps for a different purpose or situation, you can click "Show Advanced Actions", and then use the **Edit Copy** button that appears. Just select the letter you want to copy *from* in the Letter drop-down list (most likely by using the standard name), then click **Edit Copy**. It will prompt you with a "Name for Copy of File to Edit". Specify the new name you want to copy *to*. (The default it will show you will be the name of the file you are copying *from*, with "Copy" added, but you will probably usually want to change that, to a name that indicates what this letter is actually for. Do not add a ".htm" extension.) When you click **OK** in that window, the editor will open, editing a copy of the originally specified Letter, but with the new name. And when you return to the Merge One Letter window from the editor, the new name will be displayed, ready for you to do the merge with it.

If you have created letters that you no longer need, and they are cluttering up the Letters drop-down list, you can click "Show Advanced Actions", and then use the **Delete** button that appears to delete the selected letter. (Original letters that were installed with the program, for which you have not created an edited version, cannot be deleted.)

### **Reverting to the Original Template installed with DONATION**

If you have been editing a mail-merge template that came with DONATION and decide you have messed it up and want to start over with the original template, you need to delete your edited version and then re-make those changes in the version from the upgrade. This would also be appropriate if you find out that there is some improvement in an updated mail-merge



template document installed by an upgrade to DONATION, and you want to use that improved version, when you have already made some edits.

To do this, in this **Letters ⇒ One Letter** window, you need to make sure the desired letter name is visible in the Letter Field. First, select the correct type of letter in Section 1 of the window, and be sure that the "I want to use standard names ..." checkbox is checked in Section 1. (The templates delivered with DONATION are all the ones with the standard names.)

Then click the "Show Advanced Actions" checkbox, and then the **Delete** button at appears, to delete your edited version. (If there is no edited version, you get a message to that effect, and nothing is deleted.) After that, the last version installed with DONATION will become the official version. To edit it to put in any changes you want to make, use the **Edit** button.

### **Importing Letters**

To create a new template letter that does not start out as a copy of an existing one on the drop-down list, or to import one that you have created elsewhere or for a different database, click "Show Advanced Actions", and then use the **Browse & Edit** button that appears to bring up a Document File to Merge window in which you can select a desired existing file. You can select either HTML files or Microsoft Word files (with either the .doc or .docx extension) with the Browse & Edit button. You can select a Microsoft Word file, after changing the file type drop-down in that window, normally to the right of the File name field, from HTML Files to Microsoft Word Documents. If you do that, it will be converted and saved as an HTML file in the Letters subdirectory of the program's [data directory](#) before editing it. If you select an HTML file, and it is not in that Letters subdirectory, it will be copied to there.

Having said that, importing external files that did not start out as copies of mail-merge templates delivered with DONATION means you will have to insert all of the merge fields yourself in the editor. In addition, not all formatting that you can do with Microsoft Word will be retained well when the imported file is converted to HTML. As a result, if it is at all possible to start with an existing template file (or a copy of one), as explained above, and edit it to make your desired changes, that is highly recommended!

### **Doing the Merge**

Once you have selected the desired Type of Information, and you are satisfied with the contents of the Letter drop-down, just click the **Merge** button to do the merge. That will open up the editor again, possibly briefly display the template Letter File, and shortly fill in all of the merge fields with the appropriate data from your donor, donation(s) and/or receipt, depending on which Type of Information you selected. It automatically saves the merged letters in a standard save filename, as explained below.

If you are using the Total Donations Information option, however, when you click **Merge** you will first see a "Select Dates for Mail Merge" window. That allows you to specify a range of dates within the current year, so that only donations within that range of dates are included in the merged data. This allows you to do things like quarterly report letters to your donors. The default for this window is from January 1st (or the fiscal year start, if you are working on a fiscal year) up to the current date, which may often be what you will want.

You can make editing changes in this merged file if you want, for instance to further personalize a letter. If you wish, save those changes with **File ⇒ Save**. But changes that you

want to be retained for subsequent uses of the same letter must be made in the original template file (before the merging), with the **Edit** button.

The filename for the output merged letter (the one with real data merged into it, rather than merge fields) is always based on the name of the Letter File, by adding "\_save.htm" to the name. For instance, the default Letter for Donor Information is "donors\_merge", so the corresponding output merged file will be "donors\_merge\_save.htm".

Then, just print the letter with **File** ⇒ **Print**, the Print toolbar icon in the editor, or **Ctrl+P**. For Selected Receipt Information merges, you will be prompted to print a 2nd copy for your records. You can also optionally [email](#) the receipt or letter to any donor who has an email address, with the **File** ⇒ **Email/Print** menu option or the Email toolbar icon.

Finally, exit the editor window to come back to the Merge One Letter window.

If you are done, click **Close** to close that window and go back to the program's main window. Or, you can do more merge documents for the same donor.

### **Filtering Donations in Total Donations Information Merges**

When you are doing Total Donations Information merges, the checkbox for **I want to filter the donation information before doing the merge** becomes enabled. If you check it, then when you click **Merge**, after the prompting for a range of dates to include, you will be shown a window displaying all of the donations for the current donor, within that range of dates. You can click the **Filter** button on that window, and add a filter to restrict the donations that will be included, based on rules you supply. See [Filtering Reports](#) for details on how filtering works (it is the same for this window as for reports!).

If you add such a filter, it will affect the totals in the TotalAmount, EligibleAmount and AdvantageAmount merge fields, and also the contents of the tables created by the DetailsTable and SummaryTable merge fields.

One reason that you might want to do this would be to restrict the donations included in this letter to either just the receiptable donations, or just the non-receiptable donations, by filtering on the receiptable field. (See [Non-Receiptable Donors and Donations](#) to understand what this means.)

Another use might be to restrict the donations included to just one donation category, though doing that with a Total Donations Information merge would only make sense if the donor had multiple donations with that category. For a single donation in a category, you would likely do a Current Donation Information merge instead.

Click **Merge** on that window showing the donations data to continue with the mail merge, or you can click **Cancel** to cancel the merge. If your filter eliminates all of the donations for the donor, no letter will be merged.

### **Mail Merge Letters and Receipts and Multiple Databases**

If you have multiple databases for multiple organizations, and [switch databases](#), your template letters and receipts are specific to each database. If you need the same mail merge letter or receipt in multiple databases, you will have to separately create and edit it in each one.

Alternatively, if you have created and edited it in one database, and need it in another one, after switching to the other database you can click the "Show Advanced Actions" checkbox in this window, then use the **Browse and Edit** button to select the letter file and load it into that database.

### **Converting old Microsoft Word Mail Merge Letters**

The internal editor was introduced in version 3.10 of DONATION, in May 2008. If you were using the mail merge features of DONATION before that, you were using letters documents in Microsoft Word (filenames ending in .doc) or WordPerfect (filenames ending in .wpd).

If you want to convert existing customized letter files from Microsoft Word, you can do so. Just make sure the checkbox for using standard names for the Letter is unchecked, then click "Show Advanced Actions" and use the **Browse** button that appears, to select the Letter File. In the Document File to Merge dialog that comes up, change the files type drop-down at the bottom to "Word Document Files (\*.doc, \*.docx)", then select your existing mail-merge letter file to be converted. When you click **Open**, it will walk you through a few messages explaining that it is converting it from the .doc filename to a .htm filename (for example from donors\_merge.doc to donors\_merge.htm), and then put you into the internal editor editing that .htm file. You may have to do some further "touch ups" to make it look good in the internal editor, but your merge fields and your text and formatting should be pretty much present. Once you have edited, saved and closed the letter file, you can use **Merge** as normal to do the merging of data into that converted letter.

I'm sorry, but there is no such feature for automatically converting existing WordPerfect mail merge files. (Far fewer people use WordPerfect.) However, you should be able to open your existing WordPerfect documents in WordPerfect directly, and save them as HTML files, by using **File** ⇒ **Publish To** ⇒ **HTML**. (At least, that's how it is done in WordPerfect 11, which is the version we have.) Then you can open those files in the internal editor in DONATION by using **Browse** to select them, and insert the desired merge fields. (Merge fields from existing letters either get dropped, or don't get translated to the right sort of merge fields in the HTML files, depending on whether you are using letters that you previously used with **Letters** ⇒ **One Letter**, or with **Letters** ⇒ **Mass Mailing**.)

## **18.3 Creating Mass Mailings**

Using **Letters** ⇒ **Mass Mailing**, you can create letters for all Donors in the current year's Donor List, or for a selected group of them. They can include just Donor information, or also include information on the individual donations for each donor (within a specified range of dates), on the total donations for that donor (within a specified range of dates), or on a specified range of receipts.

Because **Letters** ⇒ **Mass Mailing** allows you to email the generated letters to donors as an attachment, there may be cases when one of the other methods for emailing to donors from DONATION (the **Letters** ⇒ **Email Donors** [menu option](#) or [Using Mass Email Services](#)) would be more appropriate. Please see [Using Mass Email Services](#) for a full discussions of the pros and cons of each method.

If you are going to use **Letters** ⇒ **Mass Mailing** and have not yet done so, please first read the Help topic [Creating Letters for One Donor](#), because this option builds strongly on that one, with most the controls in its window being the same. Also, please first read [Creating Mail Merge Letters](#) for an overview of these features.

There are several training videos on Mail Merge letters and receipts on the [Demos and Samples](#) web page, if you would prefer to see these features demonstrated live, rather than reading about them.

Before you can use this Mass Mailing feature, you need to have a template document that will form the basis of the letter. The documents used by this option are exactly the same as the ones used by the **One Letter** option. (This is a change that started in version 3.10 of DONATION. In prior versions, separate letters with different types of merge fields were used for the two **Letters** menu options.)

### **Type of Information Options**

The following are the options for Type of Information in in the Merge Letters window that comes up when you use **Letters** ⇒ **Mass Mailing**:

#### **Donor Information only**

Creates one letter for for each donor. Note that this includes all donors on the Donor List, whether or not they have any donations. (However, the TotalAmount field can be used to [filter](#) out donors with or without donations in the current year.)

#### **Individual Donation Information**

Prompts for a range of dates when you click **Merge**, then creates one letter for each donor's donation within that range of dates. (If a donor made more than one donation within that date range, or a donation was split into multiple entries because it was for multiple donation categories, it will generate one letter for each donation.)

#### **Total Donations Information**

Prompts for a range of dates when you click **Merge**, then selects only donors that have made donations within that range of dates, and gives information on their total donations. Letters for this option can include the «DetailsTable» and «SummaryTable» merge fields, giving details or summary by category information on the donations included in the totals.

#### **Pledge Information**

Creates one letter for each donor who has a pledge, with different default letters being used (and different merge fields being available) for the different pledge types, set in the [Pledges tab](#) of the **Maintenance** ⇒ **Main Window Options** window. No date range is prompted for with this option - it always reports on the entire pledge period, or the entire fiscal year, if you select the option on that window for pledges to be on a fiscal year basis.

Letters for this option can include the «DetailsTable» merge field, which gives details of the donations during the current year (or fiscal year) that are considered to be fulfilling the pledge. When you have selected the Annual with Start Date and Category pledge type, one additional special table field is provided: «DetailsTableAllCategories», When you have selected the Multi-Year pledge type, two

additional special table fields are provided:

«DetailsTableAllYears», which lists all donations that fulfill the pledge over the entire range of dates within the multi-year pledge, and «PledgeYearsTable», which lists the donor's year-by-year pledge amounts.

Note: This option is removed if you have selected not to display the Annual Pledge field on the [Donor tab](#) of the **Maintenance ⇒ Main Window Options** window.

## Receipt Information

Prompts for a range of receipt numbers, then generates one letter (or receipt) for each receipt number. Letters for this option can also include the «DetailsTable» and «SummaryTable» merge fields, giving details or summary by category information on the donations included in the receipt. This option can be used either for [Generating Receipts Using Mail Merge](#), or for creating separate cover letters for receipts. (However, you can instead add a cover letter to the standard template you are using for the receipts, so that this does not have to be done separately.)

**You cannot create new receipts with this option, only reprint existing ones or create letters based on their existing information.**

**Gift in Kind Receipt Information** This only appears if you are in Canada. It is like **Receipt Information**, but only processes special [gift in kind](#) receipts. It also does not support the «DetailsTable» or «SummaryTable» merge fields, because a gift in kind receipt is always only for one donation, and the details of that donation are available in the merge fields.

**You cannot create new receipts with this option, only reprint existing ones or create letters based on their existing information.**

When ranges of dates are involved, as in the Total Donations Information letters, or the TotalAmount (which is for the whole year) in the Donor Information letters, the current working year in the program is used. If you are in a country such as the United Kingdom, Australia or New Zealand, and have selected to use [Fiscal Year Data Entry and Receipting](#), and are working on a fiscal year, that is the range of dates that is available.

If you enter the program with the [Donors Only Password](#), only the Donor Information Only type of letters are available, and the donor fields related to donation amounts are removed.

## Steps to Create a Mass Mailing

When you select **Letters ⇒ Mass Mailing**, the following window comes up, which you will see is very similar to the one for **Letters ⇒ One Letter**, but with the addition of the a second filtering option in section (3), and a new section (4):



**Merge Letters**

1. Select the type of information you want to be merged in a mass mail merge. This will determine the merge fields which can be included in it, which are displayed in the list on the right.

☒ Donor Information only  
☐ Individual Donation Information  
☐ Total Donations Information  
☐ Pledge Information  
☐ Receipt Information  
☐ Gift in Kind Receipt Information

☐ With Advantage

**Merge Fields:**

- OrgName
- OrgName2
- OrgAddress1
- OrgAddress2
- OrgAddress3
- OrgPhone
- SignatoryName
- MemberEnvNum

2. Select the desired letter with merge codes (as listed above) in it.

☒ I want to use standard names based on the type of letter selected in step 1.

Letter:

☐ Show Advanced Actions:

3. Specify whether you want to be given a chance to select only a filtered selection of the retrieved information, and/or sort the data.

☐ I want to filter/sort the retrieved information before doing the merge or export.  
☐ I want to filter the donation information before doing the merge.

4. ☐ I want to just export the data to a file.  
 This might be in order to do the merge yourself in your word processing program.

**Note:** As mentioned in the topic on Creating Letters for One Donor, the 6th option in section (1), "Gift in Kind Receipt Information" only appears if you are in Canada. And the 4th option, "Pledge Information", disappears if you uncheck "Annual Pledge" in the Show Fields area of the Donor Details tab of the **Maintenance** ⇒ **Main Window Options** [window](#).

The "With Advantage" checkbox shown in the above image of the window is only present for Canadian users, and is only relevant for Receipt Information or Gift in Kind Receipt Information merges. Selecting it means that the filenames of the default mail-merge documents used have "\_adv\_desc" added - for instance "receipts\_merge\_canada\_adv\_desc" for Canadian English receipts, instead of just "receipts\_merge\_canada". See [Donations and Receipts with Advantage](#) for details.

The second filtering option in section (3), for filtering the donations, is only enabled (not greyed out) when you select the Total Donations Information type in section (1).

In section (1), you select the type of information to be merged into the letter, from the list above. The specific fields that can be merged in for each type of information are listed in the list box at the right. You can't do anything with the Merge Fields list at the right - it is just for information.

I will skip sections (3) and (4) in the window for now, because they are not usually used. There are sections on [filtering](#) and [exporting](#) further down on this help page about them.

Section (2) is used just like the almost identical section (2) in Merge One Letter, to select and optionally edit the Letter with the merge codes in it. This is described in detail in [Creating Letters for One Donor](#). If you uncheck "I want to use standard names ...", you can select a different template letter or receipt to use from the Letters drop-down list. By clicking the "Show Advanced Actions" checkbox, further buttons are shown (as explained in the one donor letters help page referred to previously) that allow you to make copies of existing letters, or select both HTML files and Microsoft Word files (with either the .doc or .docx extension) from anywhere on your computer. If you select a Microsoft Word file, it will be converted to HTML before editing it.

Click on the **Merge** button to do the merging of the letters.

If you are using the Individual Donation Information or Total Donations Information options, when you click **Merge** you will first see a "Select Dates for Mail Merge" window. That allows you to specify a range of dates within the current working year, so that only donations within that range of dates are included in the merged data. This allows you to do things like letters for all donations received in the last week or month (for Individual Donation Information), or quarterly report letters to your donors (for Total Donations Information). The default for this window is from January 1st (or the fiscal year start, if you are working on a fiscal year) up to the current date, which may often be what you will want.

If you are using the Receipt Information or Gift in Kind Receipt Information options, when you click **Merge** you will first see an "Enter Receipt Numbers" window in which you select the range of receipt numbers you want to recreate (or create associated letters for) via mail merge. If you aren't sure which receipt numbers to select, you can exit this option and use **Reports ⇒ Receipt ⇒ All Receipts** to see a list of all receipts that have been generated in the current year.

Once you have made these selections, the internal editor window will appear, and display all of the letters or receipts, filling in all of the merge fields with the appropriate data from your donors, donations and/or receipts, depending on which Type of Information you selected.

Page breaks between individual letters are shown with a light grey horizontal line across the page, with the words "Page Break" in the middle of it. That line does not print when you print the document. It is just a visual indicator of the hard page breaks. (If individual letters are longer than one page, the page breaks within them, normally called soft page breaks, are not shown. You can use **File ⇒ Print Preview** in the internal editor to see the real pagination.)

You can make editing changes in this merged file if you want, for instance to further personalize the letters or receipts. If you wish, save those changes with **File ⇒ Save**. But changes that you want to be retained for subsequent uses of the same letter must be made in the original file (before the merging), with the **Edit** button.

Then, just print the letters with **File ⇒ Print**, the Print toolbar icon in the editor, or **Ctrl+P**. For Receipt Information merges, you will be prompted to print a 2nd copy for your records. Finally, exit the editor window to come back to the Merge Letters window. You can also optionally [email](#) the letters or receipts to those donors who have email addresses (and print the rest if you wish), with the **File ⇒ Email/Print** menu option or the Email toolbar icon.



If you are done, click **Close** to close that window and go back to the program's main window. Or, you can do more merge documents.

### **Filtering, Sorting or Reviewing Information Before Merging**

In section (3), you can check a checkbox labelled **I want to filter/sort the retrieved information before doing the merge or export**. If you check this, after any prompting for a range of dates appropriate to the type of merge you selected, you will be shown the main selected information for all donors - everything except the data that would go into any tables available for this section (1) option, such as the DetailsTable. It appears in a window similar to DONATION's reports viewing window, after you click on **Merge**. From that window, you can click the **Filter** button if you wish, and enter filter criteria to determine which of the donors (or other selected information) should be included in the mail merge. See the Help topic on [Filtering Reports](#) for more information on how to use this. You can also use the **Sort** button on that same window to sort the information into a different order, if you want the letters or receipts to be printed in a different order from the one that we designed into the program.

Using this checkbox option and window can also be helpful just to see the information that will be merged, before you do the merge, even if you have no need to filter or sort it further.

You can also click a **Save SQL** button in this window, to save the SQL command that was used to retrieve this data to a file. You could later retrieve that SQL, in the **Database ⇒ SQL Select window**, for your own uses, such as exporting the data for use in your own [mail merges using your word processor](#). (However, see the next section on this page for a more direct way to do that, with the checkbox in section (4).)

Click **Merge** in that window displaying the data when you are satisfied with the data, or **Cancel** if you decide you don't want to create merged letters for the displayed data.

One example of when you might use filtering is if you have had a special campaign, and all donations for that campaign have been entered with a certain donation category, say "Special Fund". You might want to create customized thank-you letters for only those donations.

If so, first edit a letter for Individual Donation Information as desired. Check the checkbox for filtering, then click **Merge**. After selecting your desired range of donation dates, in the window showing the selected information, click **Filter**. In the Filter window, fill in the following options:

Column	Operator	Value	And/Or
donationcategory	Equals	Special Fund	

Click **OK** in that Filter window, and the data will be redisplayed, but only including the matching donations. Click **Merge** in that viewing window, and the merge will be done, but including only those donations for the Special Fund.

The second checkbox in this section, **I want to filter the donation information before doing the merge**, is only enabled for Total Donations Information merges, and only when you haven't checked the checkbox in section (4), described below, for just exporting the data.

If you check that checkbox, then after you click **Merge**, and after any filtering of the overall information based on the first checkbox in this section, you will be shown a window displaying all of the current working year's donations. (If there are a lot of donations, it only shows the

first 500.) You can click the **Filter** button on that window, and add a filter to restrict the donations that will be included, based on rules you supply. See [Filtering Reports](#) for details on how filtering works (it is the same for this window as for reports!).

Although all of the donations (or the first 500) were shown so that you can understand what the filtering will do, that same filter will actually be applied on a donor-by-donor basis as the filtering is done. Any donor for which the filtering eliminates all of the donations will be omitted from the overall merge results.

If you do add such a filter, it will affect the totals in the TotalAmount, EligibleAmount and AdvantageAmount merge fields, and also the contents of the tables created by the DetailsTable and SummaryTable merge fields.

One reason that you might want to do filtering on the donations would be to restrict the donations included in these letters to either just the receiptable donations, or just the non-receiptable donations, by filtering on the receiptable field. (See [Non-Receiptable Donors and Donations](#) to understand what this means.) If you do want to include only donors that have receiptable donations, along with their receiptable donations, or include only donors that have non-receiptable donations, along with their non-receiptable donations, you should only use the 2nd filter, on the donations, to achieve that! Do not also filter on the receiptable field for the donors themselves, in the first filtering option, as that could create incorrect results. When you are filtering on the donations, the Receiptable field value is only Y when both the donor is receiptable and the donation is receiptable. It is N in all other cases.

Here is one interesting exception to what was just stated, about only filtering on the receiptable field for the donations, not the one for the main donor data. Suppose you want to send Total Donations Information letters with one sort of wording to non-receiptable donors (generally other charities or businesses), and you want to sent letters with different wording to regular donors who may have some non-receiptable donations (perhaps along with some receiptable donations). For the first group, you would use only the first filtering option on the main donor data, filtering on "receiptable Equals N". For the second group, you would use both filtering options, with the first filter (on the donors) being "receiptable Equals Y" and the second one (on the donations) being "receiptable Equals N".

### **Exporting Data, for Doing Mass Mailings in your Word Processor**

If for some reason you prefer to do the mailing using your normal word processor's own mail merge features, there is an option to do so. (For instance, this is used for [Generating Mailing Labels using Mass Mailings](#).)

If you check the **I just want to export the data to a file** checkbox in section (4), the **Merge** button gets renamed to **Export**, and you cannot use section (2) to specify the file names, or the 2nd filtering option in section (3).

When you then click **Export**, the same data that would be available for merge fields in the built-in mail merges is exported to a CSV (comma-separated value) file. The program tells you the name of this file. You can use this file as a data file for a mail merge in your word processor. (Note: CSV files are known to work well with Microsoft Word. We cannot tell you whether they will work as well with other word processors, but they are a standard data export format.)

It is beyond the scope of this documentation to tell you whatever you need to know about doing mail merge in your word processor. Please consult the program's documentation if you need help with that.

As mentioned, the exported data is stored in comma-separated Value (\*.csv) files. It might be more natural to use Microsoft Excel files for the data with Microsoft Word, but it turns out that this requires you to have Excel installed, and some users only own Word but not Excel. If you do have Excel installed, however, after exporting the data, you are given an option to open the exported file in Excel.

The following table lists the names of the exported data files for each type of export information. They are exported into the same directory that the letters are in, the Letters subdirectory of the [Data Directory](#).

Type of Information	Exported Filename
Donor Information only	export_donors.csv
Individual Donation Information	export_donations.csv
Total Donations Information	export_donationTotals.csv
Pledge Information	export_pledges.csv
Receipt Information	export_receipts.csv
Gift in Kind Receipt Information	export_receipts_gik.csv

There are also some details on the mail merge features of Microsoft Word in the Help topic on [Doing Mail Merges using Save As from Reports](#).

One major limitation of doing mail merges in Word (or any other word processor) is that it is not possible to export and use the data that would go into the «DetailsTable» and «SummaryTable» merge fields (and some other tables in Pledge Information merges) that are available in the internal editor.

## 18.4 Mail Merge Fields

This page describes all of the fields that are available for use in the [mail merge letters](#). They are inserted when you are editing a template in the [mail merge editor](#).

This page includes the following subsections:

[Common Donor and Organization Information](#) (included in all types of letters)

[Donor Information](#) (added only to Donor Information letters)

[Individual Donation Information](#)

[Total Donations Information](#)

[Pledge Information](#)

[Receipt Information](#) (including Gift in Kind Receipts)

Specifying the [DetailsTable](#) (and related fields)

Controlling [French and English](#) use

Using [If, Else and Endif](#) to include optional text

Creating [Reports](#) instead of Letters (mail merge documents that include one or several lines per donor or donation etc., instead of separate pages for each)

### **Common Donor and Organization Information**

First, the following fields are available no matter which of the radio buttons at the top of the Merge Letters or Merge One Letter window you select, because they are either about the donor, or are more general fields about your organization.

Please note that in all cases, if there is no information filled into a given field, and it is used in a mail merge, it will just be replaced with nothing. Also, in the Merge Letters or Merge One Letter window these field names are displayed as is, but when they are inserted as merge fields in letters, they are surrounded by the double angle bracket characters, as in «Name».

<b>OrgName</b>	Your Organization Name, from <b>Maintenance</b> ⇒ <b>Organization Info</b>
<b>OrgName2</b>	Your Organization Name 2, from the same window
<b>OrgAddress1</b>	Your organization's Address Line 1, from the same window
<b>OrgAddress2</b>	Your organization's Address Line 2, from the same window
<b>OrgAddress3</b>	Your organization's Address Line 3, from the same window
<b>OrgPhone</b>	Your organization's Phone number, from the same window
<b>SignatoryName</b>	The Receipting Person from <b>Maintenance</b> ⇒ <b>Organization Info</b> , which is generally filled in with something like "John Smith, Treasurer"
<b>MemberEnvNum</b>	The donor's Member/Envelope number
<b>Name</b>	The donor's Business Name, if that field is filled in, or otherwise the First Name and Last Name (optionally preceded by Title - see <a href="#">below</a> )
<b>NameWithMiddle</b>	Same as <b>Name</b> , except if there's no Business and a Middle Initial has been filled in for the donor, it is included (optionally preceded by Title)
<b>FullName</b>	The donor's First Name and Last Name (optionally preceded by Title)
<b>FullNameWithMiddle</b>	Same as <b>FullName</b> except if a Middle Initial has been filled in for the donor, it is included (optionally preceded by Title)
<b>BusinessName</b>	The donor's Business Name
<b>LastName</b>	The donor's Last Name
<b>Title</b>	The donor's Title
<b>FirstName</b>	The donor's First Name
<b>MiddleInitial</b>	The donor's Middle Initial
<b>FullAddress</b>	The donor's full address - all three lines, plus the postal code, with line breaks between each line of the address, so that it will display in a letter as an address block
<b>Address1</b>	The donor's Address Line 1
<b>Address2</b>	The donor's Address Line 2
<b>Address3</b>	The donor's Address Line 3
<b>PostCode</b>	The donor's Postal Code
<b>Phone</b>	The donor's Phone number
<b>Email</b>	The donor's Email address
<b>Category1</b>	The donor's Category 1 field (which may display with a different heading in the Donor Details area of the main window, if you have set it up to do so in the Donor Details tab of the <b>Maintenance</b> ⇒ <b>Main Window Options</b> <a href="#">window</a> )
<b>Category2</b>	The donor's Category 2 field (as for Category1)
<b>Pledge</b>	The donor's annual Pledge amount, or \$0 if there was no pledge. (This field is omitted from Pledge Information merges, but added back in later in the list as either Annual Pledge or Current Pledge.)
<b>CharitableNum</b>	The donor's Charitable Number (which should only be filled in if the donor is a charity). Note that for Receipt Information letters, there is

	also a <b>CharitableNumber</b> field, which is your organization's charitable number. (Sorry for any confusion this may cause!)
<b>Groups/Committees</b>	This uses the contents of this field for the donor, but in the merged letter it substitutes in an appropriate list of the Full Names of the <a href="#">Groups or Committees</a> you have specified this donor is part of. So for instance if you have groups with Full Names "Group 1", "Group 2" and "Group 3", then if a donor has just the first one of them selected the merged field would show "Group 1". If the donor has the first two selected, it would show "Group 1 and Group 2". And if the donor has all three selected it would show "Group 1, Group 2 and Group 3".
<b>OtherInfo1</b>	The donor's Other Info 1 (which may display with a different heading in the Donor Details area of the main window, if you have set it up to do so in the Donor Details tab of the <b>Maintenance</b> ⇒ <b>Main Window Options</b> <a href="#">window</a> )
<b>OtherInfo2</b>	The donor's Other Info 2 (as for Other Info 1)
<b>OtherInfo3</b>	The donor's Other Info 3 (as for Other Info 1)
<b>OtherInfo4</b>	The donor's Other Info 4 (as for Other Info 1)
<b>OtherInfo5</b>	The donor's Other Info 5 (as for Other Info 1)
<b>OtherInfo6</b>	The donor's Other Info 6 (as for Other Info 1)
<b>Year_Number</b>	The current year that you are working on in DONATION, for example 2016
<b>Today</b>	Today's date (which you may want to use as the date of the mail merge letters)
<b>if:FIELDNAME</b>	See details <a href="#">below</a>
<b>else</b>	See details <a href="#">below</a>
<b>endif</b>	See details <a href="#">below</a>
<b>NoPageBreaks</b>	Tells the <b>Letters</b> ⇒ <b>Mass Mailing</b> routine not to put page breaks between the merged information for successive donors, donations or receipts that are being merged, so that you can create a report rather than letters. See <a href="#">below</a> for details.

### Currency and Date Formats

All currency fields display in mail merge letters in your currency format as set in Control Panel (the same way they display when you are entering them, and on other reports). All date fields display in a format like "December 31, 2016", subject to changes for French and English (see [below](#)).

### Renameable Fields

You will note that if you change the labels for the donor Category 1 or 2 fields or the Other Info 1 through 6 fields in the **Maintenance** ⇒ **Main Window Options** [window](#), the relevant mail merge field names do **not** change. Why? Suppose you had changed the label of Category 1 to "Membership Status", and the program then allowed you to use a merge field «MembershipStatus». What if you then decide to again change the label for Category 1, to just "Membership"? Any mail merge document using «MembershipStatus» would then be broken, because there was no longer a field with that name! So the mail merge fields for these donor details fields always have the standard names, Category1 or Category2, or OtherInfo1 through OtherInfo6, as listed above.

Middle Initial

The merge fields that include the Middle Initial are omitted from the list if you have not checked "Middle Initial" in the "Show Fields" area on the **Maintenance ⇒ Main Window Options** [window](#).

Title

Similarly the Title merge field is omitted if you have not checked "Title" in the "Show Fields" area of the **Maintenance ⇒ Main Window Options** [window](#). There are no separate merge fields for names with titles, because the Title is automatically included or excluded from all Name fields depending on the value of the "Include Title in Names in Letters and Receipts" checkbox on the Main Window Options window.

**Donor Information**

The following fields are added to the base Donor fields, when you select "Donor Information only":

<b>TotalAmount</b>	The total amount of all donations this year for this donor. This can be used for Filtering, for example to mail only to those donors who have not yet donated this year (for whom the TotalAmount will be 0).
<b>OutstandingAmount</b>	The annual Pledge amount (or 0, if it is not filled in for this donor) minus the TotalAmount. This will be a positive number if to donor has not yet fulfilled their pledge, 0 if they have exactly fulfilled their pledge, and a negative number if they have given more than their pledge. It can be used in <b>Letters ⇒ Mass Mailing</b> , with some <a href="#">Filtering</a> , to create and use custom letters for things like "You still owe \$X on your pledge of \$Y" etc. See <a href="#">Pledges in DONATION</a> for more information on pledges.
	Note: It is probably better to use the Pledge Information type of mail-merge letter if you want to report on pledges, as it has more appropriate fields. This OutstandingAmount field is only included because it was available before the Pledge Information type of letter was added (in version 3.35 of DONATION), and we do not want to remove this option and break any existing letters that users have designed!
<b>LastYearAmount</b>	The total amount of all donations last year for this donor, or \$0 if there were none.
<b>Receiptable</b>	Whether the donor is considered to be receiptable (Y or N), based on the rules listed in <a href="#">Non-Receiptable Donors and Donations</a> .

**Individual Donation Information**

The following fields are added to the common Donor and Organization fields, when you select "Current Donation Information" in Merge One Letter, or "Individual Donation Information" in Merge Letters:

<b>DonationDate</b>	The Date of the donation
<b>DonationAmount</b>	The Amount of the donation (or Total Amount, if you have chosen to display the Eligible Amount field in the Donations tab of <b>Maintenance ⇒ Main Window Options</b> ). For more details on the three amount fields



available for merging, see the discussion in the page on [Entering New Donations](#).

<b>EligibleAmount</b>	The Eligible Amount of the donation, if you have chosen to display and enter that field, or the Total Amount otherwise
<b>AdvantageAmount</b>	The amount of advantage of the donation, which is the Total Amount minus the Eligible Amount. It will always be zero if you are not using Eligible Amounts.
<b>DonationCategory</b>	The Category of the donation
<b>DonationChequeNo</b>	The Cheque # / Paid By value for the donation. However, if it is an actual cheque number that you have entered there, for example 123, this field is replaced by either "cheque number 123" or "check number 123", depending on whether you are in Canada or the U.S.A. respectively. That allows for wording in your letters like "You paid this donation by «DonationChequeNo».", which would end up sounding odd if only "123" was substituted for the merge field.
<b>DonationDescription</b>	The Description from the donation, if there is one.
<b>AdvantageDescription</b>	The contents of the Description of Advantage field entered for a donation with advantage. See <a href="#">Donations and Receipts with Advantage</a> for details.
<b>YTDTotalAmount</b>	The total amount of all donations this year for this donor.
<b>AppraiserName</b>	If you have filled in an appraiser (by clicking on the drop-down arrow on the Description field, which appears only if the appropriate checkbox in the Donations tab of the <b>Maintenance</b> ⇒ <b>Main Window Options</b> <a href="#">window</a> has been selected), the Appraiser Name will be filled into this field.
<b>AppraiserAddress</b>	If you have filled in an appraiser, their complete address, with line breaks between each line of the address, so that it will display in a letter as an address block
<b>Receiptable</b>	Whether the donation is considered to be receiptable (Y or N), based on the rules listed in <a href="#">Non-Receiptable Donors and Donations</a> . This is only Y if both the donor and the donation are receiptable.

**Note: The following three fields will only be filled in if the current donation has been included in a receipt.**

<b>ReceiptDate</b>	The date of the receipt that this donation is included in.
<b>ReceiptNum</b>	The receipt number (for example 2016-00001) of the receipt that this donation is included in
<b>ReceiptType</b>	The type of receipt that this donation is included in, for example nothing (for original receipts) or "DUPLICATE RECEIPT", or "CORRECTED RECEIPT" for users in countries other than Canada (including the U.S.A.) For Canada, see <a href="#">Replacement or Correction Receipts for Canada</a> for details of how this works.

Please note that although the inclusion of the last three fields above mean that the Current Donation Information or Individual Donation Information letters could in theory be used to replicate a receipt (or prepare a cover letter for a receipt), that would only be appropriate for receipts that only include one donation in them. And in addition, this provides no real advantage over using the Selected Receipt Information or Receipt Information Only options, which include even more fields that are helpful in relation to receipts.



### **Total Donations Information**

The following fields are added to the common Donor and Organization fields, when you select "Total Donations Information" in either window. Please note that when you click Merge after selecting this option, you are prompted for a range of dates to report on (default the whole current year). The Amount fields, and the Details and Summary Tables, are restricted to that specified range of dates.

<b>TotalAmount</b>	The total of the Amount (or Total Amount) values of all donations within the given range of dates, for the given donor. (See more details on the three amount fields under Individual Donation Information above.)
<b>EligibleAmount</b>	The total of the Eligible Amount values of all donations within the given range of dates, for the given donor. When there is no Eligible Amount entered for a given donation, the Amount or Total Amount is used.
<b>AdvantageAmount</b>	The total amount of the advantage of all donations within the given range of dates. The advantage is the Total Amount minus the Eligible Amount.
<b>OutstandingAmount</b>	<p>The annual Pledge amount (or 0, if it is not filled in for this donor) minus the TotalAmount. This will be a positive number if to donor has not yet fulfilled their pledge, 0 if they have exactly fulfilled their pledge, and a negative number if they have given more than their pledge. It can be used in <b>Letters</b> ⇒ <b>Mass Mailing</b>, with some <a href="#">Filtering</a>, to create and use custom letters for things like "You still owe \$X on your pledge of \$Y" etc. See <a href="#">Pledges in DONATION</a> for more information on pledges.</p> <p><b>Note:</b> It is probably better to use the Pledge Information type of mail-merge letter if you want to report on pledges, as it has more appropriate fields. This OutstandingAmount field is only included because it was available before the Pledge Information type of letter was added (in version 3.35 of DONATION), and we do not want to remove this option and break any existing letters that users have designed! Also, this amount is the total pledge amount for the current year, minus only the total amount for the selected range of dates for this letter, within all donation categories. So unless the pledge is not specific to one category, and your selected range of dates is the entire year (or year to date), this amount will not tend to be very correct. It is also not affected by any Filter you add to the donations.</p>
<b>LastYearAmount</b>	The total amount of all donations last year for this donor, or \$0 if there were none.
<b>StartDate</b>	The start of the date range selected for this merge
<b>EndDate</b>	The end of the date range selected for this merge
<b>DetailsTable</b>	A table of the individual donations within the given range of dates, making up the totals, similar to the table shown in the standard built-in receipts. See <a href="#">below</a> for more details.
<b>SummaryTable</b>	A table of the totals by category of the donations within the given range of dates, similar to the table shown in the standard built-in receipts. The columns are Amount (which is the Total Amount) and Category.
<b>Receiptable</b>	Whether the donor is considered to be receiptable (Y or N), based on the rules listed in <a href="#">Non-Receiptable Donors and Donations</a> .

### **Pledge Information**

The following fields are added to the common Donor and Organization Fields, when you select "Pledge Information" in either window. There is no prompt for a range of dates for Pledge Information letters - they always report on the entire pledge period.

Which pledge fields are added depends on which type of pledging you have selected on the [Pledges](#) tab of **Maintenance** ⇒ **Main Window Options**.

The interpretation of the fields below (except for the Multi-Year type) also depends on the value of the "Pledges are on a fiscal year basis" checkbox in that window - if it is checked, then all values and tables created by fields below are based on your [fiscal year](#) as specified in the **Maintenance** ⇒ **Organization Info** [window](#).

Simple Annual Pledge type (this is the default type)

<b>AnnualPledge</b>	The Annual Pledge amount specified in the Donor Details area for the donor.
<b>PledgePaid</b>	The total of all donations during the year, which are considered to fulfill the pledge with this type of pledging. (For Canadian users, if an Eligible Amount is specified for a given donation, it is used instead of the Total Amount.)
<b>PledgeOutstanding</b>	The AnnualPledge minus the PledgePaid. However, if the pledge has been overpaid (the total donations exceeded the pledge amount), this will always show as \$0, not a negative number.
<b>DetailsTable</b>	A table of all individual donations making up the PledgePaid amount. See <a href="#">below</a> for more details.

Annual with Start Date and Category type

<b>CurrentPledge</b>	The Pledge Amount specified on the <a href="#">popup window</a> for entering the pledge details, and redisplayed in the Donor Details area.
<b>PledgeStartDate</b>	The Start Date for the pledge, specified on the same popup window.
<b>PledgeCategory</b>	The donation category for the pledge (or 'All Categories'), specified on the same popup window.
<b>PledgePaid</b>	The total of all donations for the specified pledge category, and starting on the specified start date, which are the ones considered to fulfill the pledge with this type of pledging. (For Canadian users, if an Eligible Amount is specified for a given donation, it is used instead of the Total Amount.)
<b>PledgeOutstanding</b>	The CurrentPledge minus the PledgePaid. However, if the pledge has been overpaid (the total relevant donations exceeded the pledge amount), this will always show as \$0, not a negative number.
<b>DetailsTable</b>	A table of all individual donations making up the PledgePaid amount. See <a href="#">below</a> for more details.
<b>DetailsTableAllCategories</b>	A table of all individual donations for all donation categories, for the entire year, whether or not they are part of making up the PledgePaid amount. See <a href="#">below</a> for more details.
<b>TotalAmountAllCategories</b>	The total of the donations listed in the <b>DetailsTableAllCategories</b> field's table.

Multi-Year type

<b>CurrentPledge</b>	The Pledge Amount for the current year, as specified in the table of year-by-year pledge amounts on the <a href="#">popup window</a> for entering the pledge details, and redisplayed in the Donor Details area.
<b>TotalPledge</b>	The Pledge Total amount for the entire multi-year pledge period, as specified on the same popup window.
<b>PledgeStartDate</b>	The Start Date for the pledge, specified on the same popup window.
<b>PledgeYears</b>	The number of years for the pledge, specified on the same popup window.
<b>PledgeEndDate</b>	The End Date for the pledge, calculated on the same popup window from the Start Date and Years selections (and affected by the "First pledge is for an entire year" setting).
<b>PledgeCategory</b>	The donation category for the pledge (or 'All Categories'), specified on the same popup window.
<b>PledgeFrequency</b>	The frequency that the donor intends to donate towards the pledge (shown as an adverb, for example "annually" etc.), specified on the same popup window.
<b>PledgePaid</b>	The total of all donations for the specified pledge category, within the range of the start date and end date, but only in the current year. (For Canadian users, if an Eligible Amount is specified for a given donation, it is used instead of the Total Amount.)
<b>PledgeOutstanding</b>	The CurrentPledge minus the PledgePaid. However, if the pledge has been overpaid in the current year (the total relevant donations exceeded the pledge amount), this will always show as \$0, not a negative number.
<b>TotalPledgePaid</b>	The total of all donations for the specified pledge category, within the range of the start date and end date, in all years of the pledge period. As with PledgePaid, the Eligible Amount is used for Canadian users if it is relevant.
<b>TotalPledgeOutstanding</b>	The TotalPledge minus the TotalPledgePaid, again showing \$0 if the pledge has been overpaid over the entire period.
<b>DetailsTable</b>	A table of all individual donations making up the PledgePaid amount (in the current year only). See <a href="#">below</a> for more details.
<b>DetailsTableAllYears</b>	A table of all individual donations making up the Total PledgePaid amount (in all years). See <a href="#">below</a> for more details.
<b>PledgeYearsTable</b>	A table of the year-by-year pledge amounts specified in the popup window, showing Year and Pledge as the column headings.

Note: in most cases you would probably choose to include only one of the **DetailsTable** and **DetailsTableAllYears** fields in any one mail-merge letter, although the sample letter provided with the program includes both.

**Receipt Information or Gift in Kind Receipt Information**

The following fields are added to the common Donor and Organization Fields, when you select "Selected Receipt Information" in Merge One Letter, or "Receipt Information" in Merge Donors, or "Gift in Kind Receipt Information" in either one. (Note that this last option only appears if you have selected the option for different receipts for Gift in Kind donations in the **Maintenance** ⇒ **Receipt Options** [window](#).)

<b>ReceiptAmount</b>	The total amount of the receipt (the sum of the Total Amounts of all donations included in the receipt)
<b>EligibleAmount</b>	The eligible amount of the receipt (the sum of the Eligible Amounts of all donations included in the receipt)
<b>AdvantageAmount</b>	The amount of the advantage in the receipt (the sum of the Advantage Amounts of all donations included in the receipt)
<b>ReceiptDate</b>	The date the receipt was issued
<b>ReceiptNum</b>	The receipt number (for example 2016-00001)
<b>ReceiptType</b>	The type of receipt that this donation is included in, for example nothing (for original receipts) or "DUPLICATE RECEIPT", or "CORRECTED RECEIPT" for users in countries other than Canada (including the U.S.A.) For Canada, see <a href="#">Replacement or Correction Receipts for Canada</a> for details of how this works.
<b>YTDTotalAmount</b>	The total of all Total Amounts of all donations included in <u>all</u> receipts for this donor, not just the current receipt. <b>Note:</b> This field and the two following fields, which are related, should probably seldom be used on merge letters being used as receipts, because they could be confusing to the donors.
<b>YTDEligibleAmount</b>	The total of all Eligible Amounts of all donations included in <u>all</u> receipts for this donor, not just the current receipt
<b>YTDAvantageAmount</b>	The total of all Advantage Amounts of all donations included in <u>all</u> receipts for this donor, not just the current receipt
<b>Location</b>	The Location the receipts were issued in, which is entered in <b>Maintenance</b> ⇒ <b>Receipt Options</b> . This needs to be printed on all Canadian receipts.
<b>CharitableNumber</b>	Your organization's charitable number, from <b>Maintenance</b> ⇒ <b>Organization Info</b> . For Canadian organizations, this is your Charity BN / Registration #, and it must be included on all receipts. For U.S. organizations, this is your Tax ID / EIN (and it is optional whether to include it on receipts). For Australian DGR organizations, this is your ABN number. For New Zealand organizations, this your Charities Commission Number. <b>Note:</b> This field is different from the <b>CharitableNum</b> field, which is the donor's charitable number, if the donor is a charity.

The following field is only added for Receipt Information merges, and only when the Receipt Style / Location you selected in the **Maintenance** ⇒ **Receipt Options** [window](#) is set to "U.S.A.":

<b>ReligiousBenefit</b>	Set to "Y" if you checked the radio button for "Donors receive an intangible religious benefit" in the <a href="#">Options for U.S.A. Only</a> section of the Receipt Options window, and empty otherwise. This can be used with the «if:FIELDNAME», «else» and «endif» <a href="#">fields</a> to introduce variations in the wording on the receipts.
-------------------------	--

The following fields are only added for Receipt Information merges, and only when the Receipt Style / Location you selected allows for [Fiscal Year Receipting](#):

<b>Fiscal</b>	"Magic" field, set to "Y" if the current working year for data entry and receipting is a fiscal year, and empty otherwise. For use in code such as
---------------	--

**YearOrYearEnd**      «if:Fiscal»*text related to fiscal years*«else»*text related to regular calendar years*«endif»  
 The fiscal year end date if the current working year for data entry and receipting is a fiscal year, or just the year number if the current working year is a calendar year.

The following four fields are only added for Receipt Information merges:

**DonationDateOrYrPrompt**    The text "Date of donation" for receipts that include only one donation, or "Year of donations" for receipts that include multiple donations. The wording changes appropriately to French only or bilingual French and English if you your "Receipt Style / Location" is set to one of the Quebec options in the **Maintenance** ⇒ **Receipt Options** window.

**DonationDateOrYr**    The date of the donation for receipts that include only one donation, or the year of the donation for receipts that include multiple donations.

**MultipleDonations**    This is a sort of "magic" field. For receipts that include only one donation, nothing will appear if you include the field «MultipleDonations» in a receipt template; for receipts that include multiple donations, "Y" will appear (without the quotes). By itself that isn't useful. But if you use code such as:  
 «if:MultipleDonations»*text related to multiple donations*«else»*text related to single donations*«endif»  
 (using the if/else/endif codes [described below](#)) you can include variable text in your receipts based on whether there is one or more donation included in the receipt!

**DetailsTable**    A table of the individual donations included in this receipt, similar to the table shown in the standard built-in receipts. See [below](#) for more details.

**SummaryTable**    A table of the totals by category of the donations included in this receipt, similar to the table shown in the standard built-in receipts. The columns are Amount (which is the Total Amount) and Category.

Note that the DetailsTable and SummaryTable fields are not available for Gift in Kind receipts, or for receipts with Advantage.

The following fields are only added for Gift in Kind Receipt Information:

**DonationDate**    The Date of the Gift in Kind donation included in this receipt

**DonationDescription**    The Description of the Gift in Kind donation included in this receipt

**AppraiserName**    If you have filled in an appraiser for this donation (by clicking on the drop-down arrow on the Description field, which appears only if the appropriate checkbox in the Donations tab of the **Maintenance** ⇒ **Main Window Options** [window](#) has been selected), the Appraiser Name will be filled into this field.

**AppraiserAddress**    If you have filled in an appraiser for this donation, their complete address, with line breaks between each line of the address, so that it will display in a letter as an address block

The following field is only added for Canadian receipts, if you are generating receipts with Advantage, or you check the "With Advantage" checkbox in **Letters** ⇒ **One Letter** or **Letters** ⇒ **Mass Mailing**. See [Donations and Receipts with Advantage](#) for details.

**AdvantageDescription** The contents of the Description of Advantage field entered for the donation with advantage you are creating or reprinting a receipt for, if it was filled in (or if the receipt is also a Gift in Kind), or the contents of the Description field if it's not a Gift in Kind and the Description of Advantage is not filled in.

### Specifying the Details Table

When you select to insert the **DetailsTable** field for either Total Donations Information or Receipt Information, a Select Donation Fields window comes up on which you can specify which columns you want to appear in the table.

- The three normally included fields for receipts, Date, TotalAmount and Category, are already displayed in the Fields to Display list on the right.
- The Date and TotalAmount fields cannot be removed from the Fields to Display list.
- The other available fields for this table (EligibleAmount, AdvantageAmount, ChequeNo and Description) are in the Available Fields list on the left.
- Select additional fields to display, if desired, by clicking on them in the list on the left and clicking the **Add** button, or double-clicking on them in that list.
- Removed fields from the display, if desired, by clicking on them in the list on the right and clicking the **Delete** button, or double-clicking on them in that list.
- You can also change the order of the fields in the list on the right by clicking on a field and clicking the **Move Up** or **Move Down** buttons.

For Total Donations Information mail merges, one more field is available: Receiptable. This shows a Y or N, indicating whether the donation (and its donor) are receiptable, in accordance with the rules under [Non-Receiptable Donors and Donations](#).

You can also, optionally, check the "Display 2 groups of columns of donations" checkbox, as long as you have only selected to display at most 3 fields in the table. If you do that, the headings of the table will be something like "Date Amount Category Date Amount Category" (assuming those standard 3 fields were selected), i.e. two donations will be shown on each row. This will save space in the letter or receipt.

The available fields differ slightly for the DetailsTable for Pledge mail merge letters - see below for details.

Once you have made your selections, click **OK** in this window to insert the field into your document. It will display as something like this (if you included only the three default columns):

«DetailsTable:Date,TotalAmount,Category»

As you can see, what appears is the main merge field name ("DetailsTable"), followed by a colon, followed by a comma-separated list of the selected columns for that table. You can also hand-edit that merge field in the letter if you are careful. However, if you want to change the list of columns in the table, the easiest thing is to delete the entire merge field, then re-enter it from the list of insertable fields at the top of the window.



If you do check the "Display 2 groups of columns of donations" checkbox, the generated field will be:

«DetailsTable:Date,TotalAmount,Category;2column»

The ";2column" is a code indicating to show two groups of columns on each row. If you are careful, and think the table will still fit across the page, you can actually enter that code yourself, after the list of fields in a «DetailsTable» code, even if you are using more than the three standard fields. (The program won't let you select that option in the Select Donation Fields window if you have selected additional fields.)

Note: The Date column in the details table appears in a format like "Dec 31, 2016", to keep it relatively short so that more columns can fit into the table. However, that can be changed to use the Windows Short Date style set in Control Panel's Regional and Language Options tool if you check "Use Windows short dates for Details sections" in the **Maintenance ⇒ Receipt Options window**.

#### DetailsTables for Pledge Information merges

For the Pledge Information type mail merges, the **DetailsTable** and **DetailsTableAllYears** fields work almost exactly the same way as described above, with the popup window for selecting fields. However, because for Canadian users the Eligible Amount of a donation (when specified) is always considered to be the amount that fulfills a pledge, there is no reason to include the distinct TotalAmount, EligibleAmount and AdvantageAmount fields in the options for this table. Thus, only an Amount field is used. So the default three fields become Date, Amount and Category.

Those two tables only ever list donations that go towards fulfilling the pledge.

For the pledge type Annual with Start Date and Category, the **DetailsTableAllCategories** field is also available. It behaves exactly like the **DetailsTable** field for Total Donations Information letters, listing all donations for all categories, whether or not they go towards fulfilling the pledge. It always shows the donations for the entire year (calendar year, or fiscal year if you have selected to have pledges be for fiscal years), and always shows the total amount (never the Eligible Amount). For that same pledge type, the **TotalAmountAllCategories** field is also available, which will give the total of the donations shown in the **DetailsTableAllCategories** field's table.

#### Changing the Font Size for the Details and Summary Tables

All of the current versions of the mail-merge receipts and letters that include details or summary tables have code in them that sets the font size in those tables to 12pt. However, that code unfortunately tends to disappear if you ever edit the templates in Microsoft Word, so you might need to know how to restore it. Alternatively, you might need to find and edit it, if you want to change that point size. If you need to restore or edit it, use the **Actions ⇒ View/Edit Source in Notepad** menu option or corresponding toolbar button, from the mail-merge editor, to bring the code for that document up in the Windows text editor program Notepad.

Near the top of the file, you will see a section under a line containing "<style>". Look for two lines like:



table.DetailsTable td, table.DetailsTable th, table.SummaryTable td, table.SummaryTable th  
{font-size: 12pt;}

(You may alternatively see a variation on that, splitting it out into more lines.) If you see those lines, and want to change the font size, just change wherever it says "12pt". If those lines are absent, add them in, and again change the point size if you wish.

Save that change in Notepad (with the **File** ⇒ **Save** menu option) then exit Notepad. That will return you to the built-in editor, which will give you a message saying that the file has been changed, and prompting you to reload it. Answer **Yes**.

That will not change the apparent size of the mail-merge fields for the details or summary tables in the editor, but it will change the font on actual merged tables when you do your merge. (Changing the size of the merge fields for the tables directly in the built-in editor actually does nothing to change the merged results, although you might hope otherwise!)

#### Varying Languages in the Details and Summary Tables

Normally the column headings in these tables are in English or French (or both) depending on the selection you make in the **Maintenance** ⇒ **Receipt Options** [window](#). If those are the languages you are using, please ignore the rest of this sub-section!

It is possible to override the normal wordings in English or French to support other languages, but only with these mail-merge fields - not for the built-in receipts that are not done by mail-merge.

To do that language overriding, you need to edit the DONATION.INI file which is in the program's [Data Directory](#), with a text-editing program such as Notepad (do not use a Word Processor!). Find the section in that text file headed by:

[Database:*extension*]

where *extension* is replaced by the file extension on the database you are making these changes for. Normally that is DB if you only have one database (so you would be looking for "[Database:DB]"), but if you are [Switching Databases](#), you will have multiple extensions and may need to make these changes for each of them (if they are all using the same language).

Under that heading, you need to add lines such as:

```
DateHeading=Date
CategoryHeading=Category
TotalAmountHeading=Total Amount
AmountHeading=Amount
EligibleAmountHeading=Eligible Amount
AdvantageAmountHeading=Value of Advantage
ChequeNoPaidByHeading=Cheque No. / Paid By
DescriptionHeading=Description
```

The values on the left of the equals signs must be exactly as shown above; the values on the right are whatever you want in your language to replace the sample English-language headings list above. The TotalAmountHeading, EligibleAmountHeading and

AdvantageAmountHeading are only for if you are doing [split receipting](#) as in Canada, otherwise only AmountHeading is used.

The first list above is all the ones that can be used for the **DetailsTable** and **DetailsTableAllYears**. Only AmountHeading and CategoryHeading in that list above are used in the **SummaryTable**. (You don't need to repeat them twice!)

### **Using «French» and «English» to Force the Language for Dates**

There are two special fields that you can insert anywhere near the top of a mail merge letter or receipt: «French» and «English». Inserting either one forces all dates printed in the merged letter or receipt to be in that language. This can serve as an override of the setting of the **Use French Dates** checkbox in the **Maintenance ⇒ Receipt Options** [window](#).

### **Using «if:FIELDNAME» or «if:FIELDNAME=VALUE», «else» and «endif»**

There are three special technical fields, «if:FIELDNAME», «else» and «endif», which can be used to eliminate irrelevant contents from a mail merge letter or receipt, if a given field's value is empty (or \$0.00, for amounts), or optionally provide alternative content if it is empty. You must always replace FIELDNAME with the name of another field on the drop-down list of fields for this type of letter, as listed above. (You can't do this with the field names "DetailsTable" or "SummaryTable", though.)

You can also specify the "if" part as «if:FIELDNAME=VALUE», which will include the text following it, up to «else» or «endif», only if the value of the field is exactly the same as the value you enter after the equals sign. (For amount-type fields, that value has to be shown in your standard currency display format, such as \$100.00.)

If you are wondering, "endif" is a common computer programming term for the end of a section that start with "if".

It's easiest to understand these new special fields via an example. For now we will use only «if:FIELDNAME» and «endif». You might have a section of a letter or receipt such as:

**Envelope #:** «MemberEnvNum»

The problem with this is that if you don't use Member/Envelope numbers, or you do use them but the current donor doesn't have one, the **"Envelope #:"** part will still show up in the merged letter. It would be better if it disappeared in those cases. To do that, surround it with the «if:FIELDNAME» and «endif» fields from the drop-down list, so that that section reads as follows:

«if:FIELDNAME»**Envelope #:** «endif» «MemberEnvNum»

Then, you need to change "FIELDNAME" to the field we are really testing for being empty, "MemberEnvNum". Change it to:

«if:MemberEnvNum»**Envelope #:** «endif» «MemberEnvNum»

Now, when you merge this letter, if the current donor has no Member/Envelope #, the **"Envelope #:"** part will be removed. If the donor does have a Member/Envelope #, it will be left in. Note that you don't need to surround the actual field «MemberEnvNum» with these special

codes, because if the donor has no Member/Envelope # this will be replaced with nothing anyways. (Though no harm would be done by including it within the "if" section.)

There's a slight difference if you use this with amount fields, such as «DonationAmount». That field is never empty, though it might be \$0.00. So its value will always be included in a letter that includes that field. If you want it to be removed if its value is \$0.00, you can use the same technique, as in:

```
«if:DonationAmount»Amount: «DonationAmount»«endif»
```

If you use those codes, then when the donation amount is \$0, nothing from the line above will be included in the letter.

For an example of using «if:FIELDNAME=VALUE», suppose you are using the [Donor Category 1](#) field with values like "Member" and "Non-Member" to indicate the donor's status in your organization. And suppose you have a sentence in a mail-merge letter that you only want included for members. The following would be how you would do that:

```
«if:Category1=Member»Thank you for being a member of our organization. «endif»
```

### Using «else»:

The «else» field can optionally be used between «if:FIELDNAME» and «endif» to provide alternative content. For instance, suppose you want to address a letter to people's first names (like "Dear Dan"), but for a few donors, there is a special nickname you wish to address them as, that should not be what you enter in the official First Name field. You could name one of the six renameable Other Info fields "Salutation" via the [Main Window Options](#) window, and fill it in only for those users with salutations different from their first names. Then the use the following in your letter:

```
Dear «if:Other1»«Other1»«else»«FirstName»«endif»,
```

That's assuming it was Other Info 1 that you renamed to Salutation, of course. That section of codes means that if the Other Info 1 (Salutation) field is filled in, it will be used. Otherwise, the First Name field will be used.

**Tip for Techies Only:** There is a minor complication using these codes when you are editing text that is in an HTML table, such as in our default layouts for mail-merged receipts. In that case, the prompt for a field (such as "Envelope #:") is generally in one cell of the table, while the field itself (such as "«MemberEnvNum»") is generally in an adjoining cell. If you wanted to make both the prompt and the field disappear if the Member/Envelope # field was empty for that donor, you would have to be careful. (Technically, you don't need to make «MemberEnvNum» disappear, because if it's empty nothing prints anyways, but this is just an example.)

In this case, if you put "«if:MemberEnvNum»" before the prompt, which is in one table cell, and "«endif»" after the MemberEnvNum field itself, which is in another table cell, then if the stuff between them is removed because there is no Member/Envelope #, you will also be removing the HTML codes that separates the two cells, and thus possibly ruining the layout of the table. To prevent this, if things appear to be in rows and columns (i.e. in a table), be sure to surround each individual section (table cell contents) with those codes, so each one is eliminated individually, without causing this type of problem.

Also, there is no "nesting" of one condition inside another, such as "«if:FIELD1»some field 1 text«if:FIELD2» some field 2 text«endif» some more field 1 text«endif»".

### **Creating Reports instead of Letters**

By using «NoPageBreaks» at the very top of your document file, you can tell the mail merge routine to skip its normal insertion of page breaks between successive donor, donation or receipt records that it is merging. This allows you to create reports, or things like directories, instead of letters.

To make this work even better, there are two special «if:» fields you can use: «if:FIRST» and «if:LAST», each of which has to be paired with «endif» as [usual](#). Whatever is enclosed in «if:FIRST» and «endif» will only be included in the output for the first record being merged. Whatever is enclosed in «if:LAST» and «endif» will only be included in the output for the very last record being merged. This, in essence, allows you to create a header section and footer section for the report that you are creating in this way.

**Tip for Techies Only:** If you want each record in the report to be one row of an HTML table, you may not be able to create what you want in just the built-in HTML editor. You may need to use **Actions** ⇒ **View/Edit Source in Notepad** in the built-in editor, to edit the HTML in Notepad, in order to get this right. What you want to end up with is something like this:

```
<HEAD>...</HEAD>
<BODY>
«NoPageBreaks»«if:FIRST»<p>Any Header Section you want.</p>
<table>
<tr><th>Column 1 Heading</th><th>Column 2 Heading</th><th>Column 3 Heading</th></tr>
<tr valign="top">«endif»
<td>«FirstField»</td>
<td>«SecondField»</td>
<td>«ThirdField»</td>
«if:LAST»</tr></table>
<p>Any Footer Section you want.</p>
«endif»</BODY>
```

This is a report with header and footer sections, and a table with three cells (columns) per row. There's a row of headers for the table at the top, and a data field in each of the cells of the table. (Of course, you replace "FirstField" by a real field name, etc.) Be sure to use the **Actions** ⇒ **Show Table Borders on Screen** menu option in the built-in editor to help you see where the table cells are and edit within them. (Those borders will not show when you print the merged report.)

Please note that if this report goes onto a 2nd or subsequent pages when you print it, the column headers (if you have any) will not be repeated. As the information above says, the «if:FIRST» and «if:LAST» section are done only once for the whole report, not once per page. We unfortunately cannot see any way to improve on this, with the technology we are using to do these mail merges.

Of course, this is not the only way to create custom reports - you would usually do that via the **Reports** ⇒ **Custom Report** [menu option](#). But this way of creating custom reports via mail merge yields something that is further editable in your word processor, and in some ways gives

you more control, for example over the headers, footers, and layout, than a Custom Report. (Mind you, you can also [save any report to a file](#), including Custom Reports, and edit it in Excel or a word processor.)

## 18.5 Editing with the Internal Editor

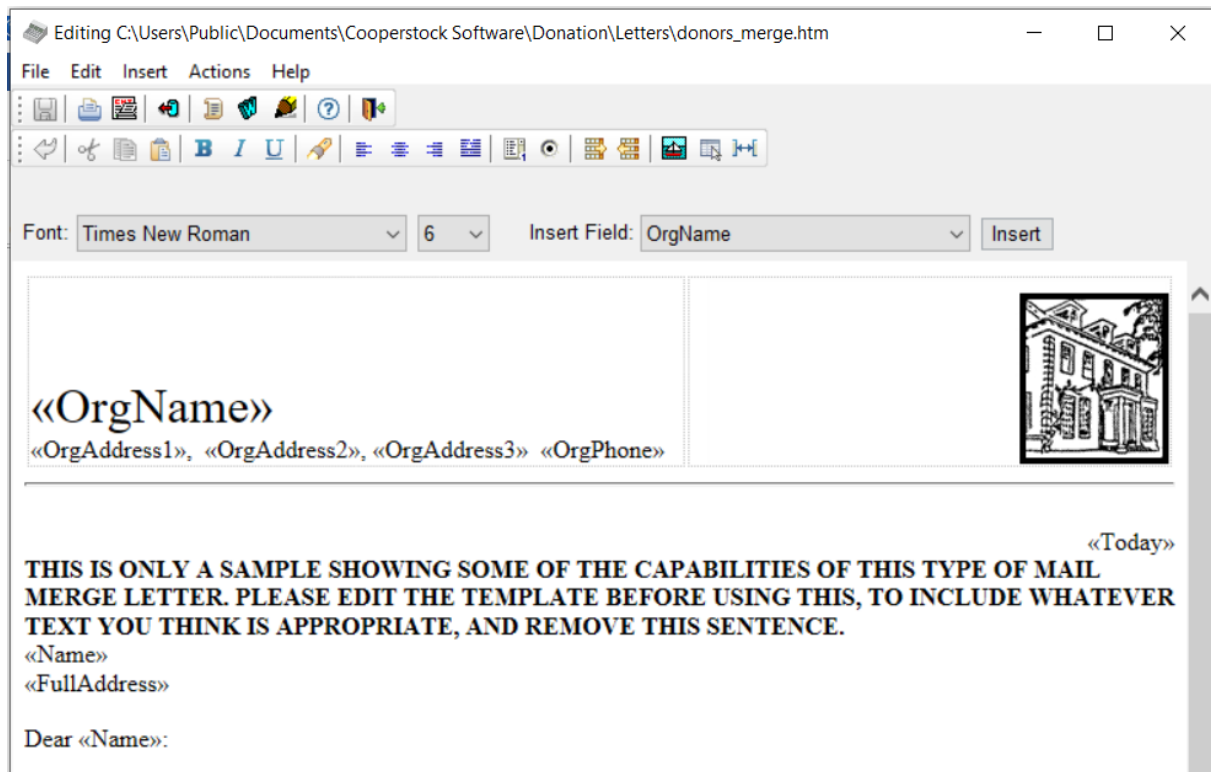
Starting in version 3.10 of DONATION, there is a new internal editor used for viewing and editing [mail merge](#) letters and receipts. It is used both for editing the template letter and receipt files used for mail merging and for viewing, optionally editing and printing completed mail merges.

The editor should be very easy to use. It is pretty much WYSIWYG (What You See Is What You Get), with standard menu and toolbar options for editing. When you are editing the original template letter and receipt files with the codes for the various merge-able fields in them, there is a drop-down list of those fields, and an Insert button that inserts them into the document at the current cursor position. When you are editing the merged documents, those controls for inserting fields are not there.

This editor is actually editing HTML files, like those that are used for web pages. Internally, what DONATION is doing is embedding an Internet Explorer window into its own window, and putting it into "edit mode", which allows editing of the page. (This is not a feature that can be accessed when you use Internet Explorer normally, but it can be controlled by programs.)

Like the main window, the editor window can be resized by clicking and dragging any edge or corner, and moved by clicking on its title bar and dragging it. When you re-open it the next time, it will be the same size and at the same position as when you last used it.

Here is a sample of the top part of the editor (in the case when you are editing a template). If you are looking at a merged document, the Insert Field text, drop-down list of fields, and Insert button are not present.








### Borders on Table Cells

In the template documents distributed with version 3.70 or higher of DONATION, all table cells have a thin grey dotted border around them, to help you understand the structure of the document and assist in your editing. Those borders disappear when you print the merged document, save it to PDF, or email it. If you are editing a previously edited document from an earlier version of DONATION, and do not see those borders, you can turn them on with the **Edit ⇒ Show Table Borders on Screen** menu option.

### Details of the Menu and Toolbar Options



#### File Menu

Menu Option	Hot Key	Toolbar Icon	Action
Open...	Ctrl+O		Allows you to open a different HTML file for editing.
Save			Saves any changes in the current file back to your hard drive. This is disabled when no changes have been made. <b>Note:</b> Pressing Ctrl+S in the editor will also save, but it is not recommended, because strangely enough the editor won't know you have saved, and it will still prompt you to save when you exit!
Page Setup and Margins...			Brings up a Page Setup dialog box, for settings such as margins.















			<p>Note that Internet Explorer's default page header and footer are turned off whenever you are using this editor, and that changes made here apply even to any printing done from a regular Internet Explorer window, but only while this editor window is open. Changes to the page header and footer made here do <b>not</b> persist between uses of this window.</p> <p>Changes to margins made here <b>do</b> persist between uses of this window, and also apply to Internet Explorer. Changes to margins in Internet Explorer's <b>Print ⇒ Page Setup</b> menu option also persist and apply both to it and to this window.</p>
Print Preview...			<p>Brings up a Print Preview of the document. <b>Note:</b> for very long merged documents (for example hundreds of pages), this can be very slow.</p> <p><b>Warning:</b> If you are mail-merging receipts, <b>do not</b> print them from the Print Preview window. Receipts only get saved back to the database if they have been printed (or saved to PDF or emailed), but the program cannot know that you printed them if you print from the Print Preview window. So if you do that, it will be as if those receipts were never created, because they will not get saved.</p>
Print...			Brings up a normal Print dialog box from which you can print the document.
Save PDF...			Brings up a Save PDF File As dialog, in which you can specify the filename and directory to save a PDF copy of the current document in. After the save, it displays the PDF file in your standard viewer for PDF files (usually Adobe Reader). See also: <a href="#">Saving Reports, Receipts and Letters as PDF Files</a> .
Email/Print			This is visible only when viewing merged letters or receipts, not when editing template files. It allows you to <a href="#">email the receipts or letters</a> to donors who have email addresses, and optionally print the rest.
Exit	Alt+F 4		Exits this editor window. If there are unsaved changes, it prompts for whether you want to save them.

For technical reasons, there is no **Save As** option on the **File** menu, although that option is common in other editors. You can do the equivalent of this by using the **Edit Copy** button in either **Letters** menu option's window, which appears after you check the "Show Advanced Actions" checkbox.

### Edit Menu


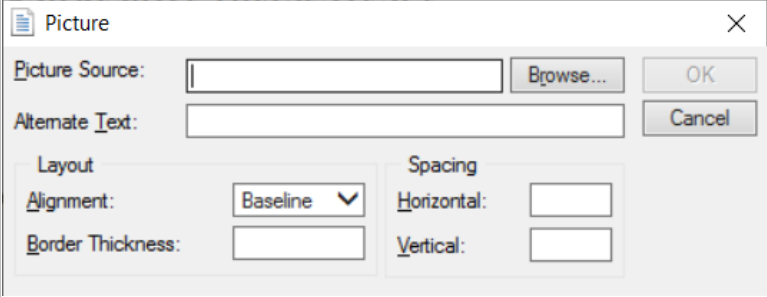
Menu Option	Hot Key	Toolbar Icon	Action
Undo	Ctrl+Z		Undoes the last editing action. This is disabled when there is nothing to undo. Note that after Saving a file, you are no longer able to undo any changes prior to the save.
Cut	Ctrl+X		Cuts any selected text out of the document, and puts it into the clipboard.





Copy	Ctrl+ C		Copies any selected text to the clipboard.
Paste	Ctrl+ V		<p>Pastes any text (possibly including formatting) from the clipboard into the document. Note that you can copy text from other programs, for example word processors like Microsoft Word or WordPerfect, to the clipboard, then Paste them into this editor.</p> <p>If any images are pasted in, if this was done with this <b>Edit</b> ⇒ <b>Paste</b> menu option (but not if it was done with <b>Ctrl+V</b>) they will be removed, because they could crash the program. Images should only be inserted with the appropriate <b>Insert</b> menu options - the first three on the <b>Insert</b> menu listed below. Images inserted with <b>Ctrl+V</b> will be removed when you try to save your changes.</p>
Select All	Ctrl+ A		Selects (highlights) all of the text in the document.
Bold	Ctrl+ B		Changes any selected text to boldface, or to normal if it is currently bold. If there is no selection, toggles whether or not the text you will type after the current cursor position is bold.
Italic	Ctrl+I		As for Bold
Underline	Ctrl+ U		As for Bold
Find	Ctrl+ F		Brings up a Find dialog box for finding text in the document
Justify			Brings up a sub-menu of the following options:
Left			Left justifies the current paragraph, or selected paragraphs
Center			Centers paragraphs, as above
Right			Right justifies, as above
Full			Does full justification, as above
Ordered List			Changes the current paragraph or selected paragraphs to be part of an ordered (i.e. numbered) list.
Unordered List			Changes the current paragraph, or selected paragraphs to be part of an unordered (i.e. bulleted) list.
Indent			Increases the indent level of the current paragraph, or selected paragraphs (i.e. moves them to the right). Note: This indents the whole paragraph, not just the first line.
Outdent			Decreases the indent level of the current paragraph, or selected paragraphs (i.e. moves them to the left).
Indent First Line of Paragraph			Indents the first line of the paragraph in which the cursor is located, by 1/2 inch. Note: For some reason this action cannot be Undone, except of course by exiting the editor without saving your changes.
Show Table Borders			For documents that are not already showing thin grey dotted borders around table cells (when displayed on the screen)

on Screen		only), they can be added with this menu option. Those borders disappear when you print the merged document, save it to PDF, or email it.
-----------	--	--


### Insert Menu







Menu Option	Hot Key	Toolbar Icon	Action
Image...			<p>Brings up a dialog box where you can specify an image to be inserted into the document at the current cursor position, and some properties for it, as follows:</p>  <p>Unlike the next two <b>Insert</b> options (<b>Logo Image</b> and <b>Signature Image</b>), images inserted in this way are not stored in the database. So if you share the database between computers in any way, or <a href="#">move the program</a> to a new computer, any such images will have to also be manually copied, to exactly the same directory they were on in the original computer, for them to appear in the document.</p> <p>One way to avoid that problem is to use an image that is on a website that your organization owns. To do that, enter the full web address of that image, such as <a href="http://www.yourorganization.com/imagename.gif">http://www.yourorganization.com/imagename.gif</a>, in the Picture Source field in the dialog box shown above. Of course that will only work consistently if all users of this database always have Internet access, and the image isn't moved or changed on your website.</p>
Logo Image			<p>Inserts the logo image created in the <a href="#">window</a> accessed via the <b>Select Logo and Signature</b> button on the <b>Maintenance</b> ⇒ <b>Receipt Options</b> window. (Because this is usually how and where it is used, it inserts the image with right alignment.) If no logo image has been specified yet, it gives you an option to use that window directly, to specify the required image. If the logo image is not exactly the standard size of 150 x 60 pixels, it gives you an option to scale it to that size.</p> <p>Logo images inserted in this way are stored in the database and will automatically work on any computer the database is moved to.</p>
Signature Image			<p>Inserts the signature image created in the <a href="#">window</a> accessed via the <b>Select Logo and Signature</b> button on the <b>Maintenance</b> ⇒ <b>Receipt Options</b> window. If no signature image has been</p>

			<p>specified yet, it gives you an option to use that window directly, to specify the required image. If the signature image is not exactly the standard size of 166 x 39 pixels, it gives you an option to scale it to that size.</p> <p>Signature images inserted in this way are stored in the database and will automatically work on any computer the database is moved to.</p>
Table...			Brings up a dialog box where you can specify a table to be inserted into the document at the current cursor position, and some properties for it. Tables can be very helpful for laying out the structure of more complicated documents, like receipts.
Horizontal Line			Inserts a horizontal line at the current cursor position.
Page Break			Brings up a sub-menu of the following options, for inserting a page break. Among other uses, this would allow you to create multiple-page letters (for example for a receipt preceded or followed by a cover letter on a separate page).
At Start of Document			Inserts the page break at the very start of the document.
At Current Cursor Position			Inserts the page break at the current cursor position.
At End of Document			Inserts the page break at the very end of the document.
Non-Breaking Space			Inserts a non-breaking space at the current cursor position. (See <a href="#">below</a> , under <b>Shift+Spacebar</b> , to understand what this is.)

You insert fields into templates by selecting a desired field from the drop-down list to the right of the text "Insert Field", just above the editing area, and then clicking the **Insert** button. The fields in the drop-down list are shown without the "<" and ">" that will surround their names when they are inserted - which shows that they are merge fields. If you click into the list, you can press the first letter of a desired field name (assuming you know what it is) repeatedly, to cycle through all fields that start with that letter.

### **Actions Menu**

Menu Option	Hot Key	Toolbar Icon	Action
Refresh	Ctrl+R		Reloads the current document from the disk. Useful if it has been edited by another program and you aren't prompted to reload it when you come back to this editor (which you actually usually are).

Zoom			Just puts up a message box explaining how to zoom in or out on the document (which doesn't change the size when you print it!) using keyboard or mouse controls.
View/Edit Source in Notepad			Optionally saves the current document, then opens the HTML source code for it in the Windows plain-text editing program Notepad. (Only for use by people who know HTML.) If you make changes in Notepad and save them, you will be prompted to reload the file when you return to this editor.
Edit in Microsoft Word			Optionally saves the current document, then opens the document for editing in Microsoft Word. If you make changes in Word and save them, you will be prompted to reload the file when you return to this editor. <b>(See <a href="#">below</a> for important notes - this has a danger of damaging the merge fields in your document, and you MUST close the file in Word after editing it, and must save the file as "Web Page, Filtered".)</b>
Edit in Dreamweaver			This menu option and toolbar option only appears if you have the HTML editor program Dreamweaver installed on your computer. Optionally saves the current document, then opens the document for editing in Dreamweaver. If you make changes in Dreamweaver and save them, you will be prompted to reload the file when you return to this editor.
Edit in Microsoft Expression Web			Like Edit in Dreamweaver above, but for the HTML editor program Microsoft Expression Web.
Edit in Microsoft FrontPage			Like Edit in Dreamweaver above, but for the HTML editor program Microsoft FrontPage.
Edit in ...			Edits in an alternative HTML editor, set up with the Configure Alternate HTML Editor menu option on this menu. This menu and toolbar option only appear if you have done that configuration, and the configured name of that program appears in place of "..." in the menu and toolbar item text.
Configure Alternate HTML Editor			Allows you to set up the name and full pathname to the executable file of an alternate HTML editor, other than any of the ones in the menu options above, which are automatically detected if they are present on your computer. See <a href="#">Configuring an Alternate HTML Editor</a> for full details.

### **Help Menu** (Toolbar Icon )

There are no options on this menu - just click the Help menu heading itself to bring up this help page.

### **Other Controls**

**Font Drop-downs** There are two drop-downs for the font. The first sets the selected font, changing any selection to that font or if there is no selection, changing anything typed after the cursor to that font.  
The second drop-down sets the font size of the current selection or what

you type after the cursor. Unfortunately, you have to select from special HTML sizes 1 through 7, with 2 or 3 being a "normal" size. Larger numbers are for larger fonts; smaller numbers for smaller fonts. For technical reasons, it does not seem to be possible to use a normal point size drop-down list in this editor. If you need more control over the font size, edit the document in Microsoft Word as described below.

**Inserting Fields** When you are editing the original letter file, there is a drop-down list of insertable fields. To insert one, place the cursor where you want the field to go in the document, select the desired field from the list, and click the Insert button. A list of detailed explanations of all of the available fields is on the [Mail Merge Fields](#) page. You can also copy and paste mail merge fields within one document, or edit them by hand - there is no "magic" in the insertion.

### **Right-Click Popup Menu**

If you right-click in the body of the editor, a standard popup menu appears. Note that this menu is provided by Internet Explorer, not by the DONATION program, so it has a few quirks in relation to how similar features work on the main menu and toolbar of this editor.

Cut, Copy, Paste, and Insert Image all work just like the same-named features in the window's menu and toolbar.

View Source works a bit differently - it doesn't prompt to save any changes first, so if there are changes, it has you edit a modified document filename. So, any changes you make will not affect the original document.

Browse View takes you out of edit mode on the document, so that you cannot make any further changes to it or save it. (So, we don't recommend using this!)

If you right-click on certain types of content, such as an image, different options may appear. I've noticed that not all of them work, such as when there is a "Properties" option, it does nothing. Sorry about that!

### **Using the Toolbar**

If you hover your mouse over a toolbar icon, it will show a description of what that tool does. If you want to see text with each icon, right-click anywhere in the toolbar and pick **Show Text** from the popup menu.

### **Special Keystrokes for Editing**

Other than the Hot Keys listed in the table of menu options above, here are few other keystrokes you may want to be aware of (most of which are in common with other word processors):

- **Enter** enters a paragraph break (with a blank line between paragraphs).
- **Shift+Enter** enters just a line break (with no blank line).
- **Insert** or **Ins** toggles (switches between) insert and overwrite mode.

- **Shift+Spacebar** inserts what is called a non-breaking space. (It looks just like a space after you insert it, though.) Using this between words, rather than regular spaces, will cause them to not wrap or be split between lines. Also, multiple non-breaking spaces will actually take up space in a line, whereas in HTML (which you are using), multiple regular spaces in a row will be compressed to one space when they are displayed. There's also an **Insert** menu option and toolbar button for inserting this character.

Other standard word processor actions also tend to work, such as selecting text by either clicking and dragging the mouse through it, or holding down the **Shift** key and using cursor movement keys (such as arrow keys).

### **Editing Documents in Microsoft Word**

If you use the **Actions** ⇒ **Edit in Microsoft Word** option, the current document is first saved if it has changes (and if you agree), then opened for editing in Microsoft Word.

**We actually do not recommend doing this if there is any way you can do your editing in the program's built-in editor (or any other pure HTML editor if you have one available). That is because even if you follow all of the instructions below carefully, there is still a danger that editing your document in Word will damage the merge fields in it so that they do not merge properly!**

If you do edit in Word, **it is crucial** that when you save any changes in it, you use Word's **File** ⇒ **Save As** menu option, and change the Save As type to "Web Page, Filtered". The other options for web pages either create files that can't be opened at all in this editor, or ones that are extremely complex and comparatively huge. Files saved with the other options may also leave some of the merge fields un-merged, when you do create a letter or receipt with them. And as mentioned above, even if you save correctly this way, there is still a danger of this problem occurring.

Some versions of Word, to get to Save As "Web Page, Filtered", under Save As on the Office menu, you need to pick Other Formats, and then you get to a Save As window on which you can change the "Save as type" to "Web Page, Filtered",

Also, you must **Close the file** in Word before returning to edit it further in this editor. If you don't, and you try to save it again in this editor, the file will not be able to be saved, and you may not even get any error messages informing you that it has not been saved!

After you return from Word to the built-in editor, you will be prompted with a message saying that the file was edited outside of the editor, asking whether you want to reload it. Answer Yes, or you will lose the changes you made.

So, why would you still want to take these risks, and edit the document in Word? Well, it's just a more full-featured editor. For editing plain text, or text with simple formatting, this internal editor is perfectly fine. But when you go beyond that, you may need more power.

The biggest issue, in our experience, is for documents like the sample receipt layouts that are installed with the program, that use tables for layout. In this internal editor, although table boundaries are visible, there is very little capability to manipulate the structure of the table. In Word, you can use lots of menu options to make changes to the structure of tables.

You can also edit the properties of things like images and horizontal lines in Word, which you can't do in this editor. (If you want to change the properties of an image in this editor, you have to delete it, then re-insert it and choose the properties you want in the insertion dialog box that comes up.)

Please note that there are many features in Microsoft Word that do not translate properly when saved as HTML. In some cases, you may have to touch up files edited with Word in this editor a bit after saving them.

Word can also actually damage some things in the HTML of mail-merge documents provided with DONATION, such as deleting some CSS (Cascading Style Sheet) codes used for setting the font sizes for the tables that can be included in receipts and other document with merge codes like «[DetailsTable](#)». That would be one reason for using the other options described in the following section of this page. If that problem does happen, please see the sub-section "Changing the Font Size for the Details and Summary Tables" in the section on the [Details Table](#) in the Help page on Mail Merge Fields for how to fix it.

Again, if it is at all possible to do all of your editing without using Microsoft Word (either by using just the internal editor, or by using other HTML editors as described below) we recommend that. Too many problems can occur after editing in Microsoft Word.

### **Editing Documents with Other Word Processors or HTML Editors**

Although there is no menu option in this editor for doing this, if you do not use Microsoft Word but use another word processing program (such as WordPerfect), you could also try editing the letters with that word processor. Almost any relatively recently word processor should have the ability to both load and save HTML files.

Of course, we cannot guarantee exactly how compatible the HTML editing and saving capabilities in other word processors will be with the internal editor in DONATION. You will have to test that out and see how it works for you. It will always be best to just use the internal editor as much as possible.

If you have a professional HTML editor like Dreamweaver, Microsoft FrontPage or Microsoft Expression Web installed, you can also optionally edit in them. The **Actions ⇒ Edit in Dreamweaver**, **Edit in Microsoft FrontPage** and **Edit in Microsoft Expression Web** menu options and corresponding toolbar icons appear for editing in them, if you have each of those programs installed respectively. If you are familiar with HTML or any of these programs, they are a better choice than editing in Microsoft Word.

If you have another HTML editor installed, you can configure editing with it, through the **Actions ⇒ Configure Alternate HTML Editor** [menu option](#). After doing that, a new **Actions** menu option and toolbar icon will appear for editing in the program you configured. The Help topic linked to in the first sentence of this paragraph gives some details about a couple of specific free WYSISYG (what you see is what you get) HTML editors that you might want to try.

Your final option for editing outside of DONATION is the **Actions ⇒ View/Edit Source in Notepad** menu option, which is only for those who really know their HTML, since it gives you no other assistance than seeing the pure HTML of the document.



As with editing in Word, after you return from any external editor to the built-in editor, you will be prompted with a message saying that the file was edited outside of the editor, asking whether you want to reload it. Answer Yes, or you will lose the changes you made.

### **Warning about Editing Mail Merge Documents other than through DONATION**

With versions of DONATION prior to version 3.66, all template mail-merge documents were just stored in the Letters directory under the program's [Data Directory](#), so you could edit them with external editing programs while DONATION was not running. After doing that, any changed files would be automatically used when you went to use them in DONATION.

Starting in version 3.66 of DONATION, however, the official copies of all template mail-merge documents are stored in the program's database, and only copied out to the Letters directory when you need to use them, either for editing or actual merging. As a result, if you edit those files outside of DONATION (that is, without using one of the menu or toolbar options in the built-in editor), then go to use them, your changes will be lost, because they will be overwritten by the copy from the database.

The solution to this is to always do editing with external editors by opening up the desired template in the internal editor first, then using one of the **Actions** menu options or corresponding toolbar buttons to do that editing. When you do it that way, after saving your changes in the external editor, and returning to the internal editor, it prompts you to reload those changes - be sure to answer **Yes**. It will all work perfectly then, and you won't lose any changes.

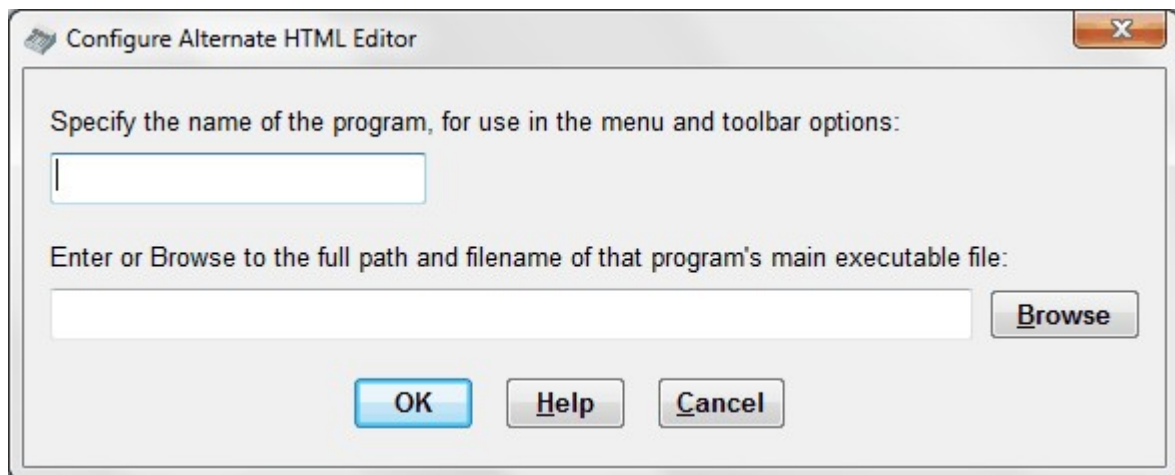
### **Editing Tables, Images etc.**

Once you have entered a table, image or horizontal line in the editor, you can't change them very much directly. If you click in them, they become selected with drag handles, which you can click and drag on to change their size. (A table becomes selected if you click on its border, rather than into a cell.) They may also be able to be affected with menu options / toolbar controls such as Indent/Outdent and the Justify options. However, you can't do anything like changing the name of a file used by an image, or the number of rows or columns in a table. For that, you would have to either delete the object (by pressing the **Del** or **Backspace** key on your keyboard when they are selected) and recreate it, or use one of the **Actions** menu options described above to edit it in an external editor.

Of course, you can edit the text in table cells, by clicking into the cell and editing normally. Many of the regular menu/toolbar options work within cells as well, such as justification, fonts, etc.

## **18.6 Configuring an Alternate HTML Editor**

When you are in the [internal mail merge editor](#), the **Actions** ⇒ **Configure Alternate HTML Editor** can be used to set things up so that you can use any other editor to do additional editing on the mail-merge letters or receipts. It brings up the following window:



This window allows you to set up the name and full pathname to the executable file of an alternate HTML editor, other than any of the ones that can normally appear in the internal editor if they are detected on your system (Notepad, Word, Dreamweaver, Microsoft Expression Web, or Microsoft Front Page).

Type in the name of the program in the first field, and enter or use the **Browse** button to find the full path and filename of the executable file to run in the second field.

Click **OK** to save your changes. (You can also clear both entry fields, and click **OK**, to remove this configuration of an alternate HTML editor.)

As usual, you can click **Help** to see this help page, or **Cancel** to close the window without making any changes.

After configuring an editor in this page, a new option appears in the Actions menu of the internal editor, and a new toolbar button, both with the text "Edit in" plus the name you specified in the first field in this window.

#### Free WYSIWYG Editor you can Install

One fairly powerful WYSIWYG editor with a free version is BlueGriffon, <http://bluegriffon.org>. However, if you use the free version it doesn't come with a manual. That can be purchased separated (as a PDF file), which as of mid-2019 costs €7.50. After you install the program from that website, the path to the program for use in the window above will be "C:\Program Files\BlueGriffon\bluegriffon.exe", or "C:\Program Files (x86)\BlueGriffon\bluegriffon.exe" on a 64-bit computer, without the quotes.

There's one weird thing in BlueGriffon, which is that by default when it opens a file from the options in our internal editor, it also opens any files that were open the last time you used it, in separate tabs, and the last previous file is in the currently displayed tab, rather than the one you were trying to edit! The file you wanted to open is in the first tab, so you may have to switch to that. To change this behaviour, go to BlueGriffon's **Tools = Preferences** menu option, switch to the File area, and check, then uncheck, the checkbox for "Restore last session's tabs". Then click Close in that window. (Yes, that doesn't sound like it makes sense, but it seems to work!)

## 18.7 Generating Receipts Using Mail Merge

While many users may find it extremely helpful to print thank-you letters etc. with the **Letters** menu options, another common use of DONATION's mail merge features will be to alter or add to the text or change the formatting of the Receipts, to be different from the built-in one provided in DONATION. Using mail merge receipts also gives you more flexibility on the size and shape of any [Logo](#) image you want to add to the receipt.

There are several training videos on Mail Merge letters and receipts on the [Demos and Samples](#) web page, if you would prefer to see these features demonstrated live, rather than reading about them.

You can easily use mail merge to completely replace the normal generation of receipts with the options on the **Receipt** menu. If you want this to happen, go to the **Maintenance** ⇒ **Receipt Options** [window](#), and check the "Create Receipts via mail merge instead of normal report method" checkbox.

**IMPORTANT:** If you check this, please also read the Help page on [Generating Charitable Receipts](#) for all of the basic information on creating receipts, almost all of which also applies to the mail merge receipts.

After checking that checkbox, the normal receipt generation using all **Receipt** menu options, like **Receipt** ⇒ **Current Donor Original** and **Receipt** ⇒ **All Donors**, will use the mail-merge version of the receipt. And you can edit the mail merge receipt template with buttons on that same Receipt Options window.

Whether or not you check that "Create Receipts via mail merge instead of normal report method" checkbox, you can always *reprint* receipts that were generated using the **Receipt** menu options by using the **Letters** menu options. However, the more common and flexible way of reprinting receipts (as opposed to using the **Letters** menu options) is to check the Receipt Options checkbox mentioned above and then use the **Receipt** ⇒ **Reprint Range** [menu option](#).

You might also want to use the mail merge options on the **Letters** menu to create cover letters for receipts that you printed with the standard **Receipt** menu options. Or, if you are using mail merge receipts and want a cover letter to always be included with the receipt, add that cover letter in at the top of the mail-merge receipt template, most likely with a page break in between them.

All of the information given in the help pages on [Creating Letters for One Donor](#) and [Creating Mass Mailings](#) applies to creating mail-merged receipts. Please read those sections carefully before proceeding. You can use **Letters** ⇒ **One Letter** to reprint one receipt at a time, or **Letters** ⇒ **Mass Mailing** to reprint receipts for a range of receipt numbers.

The sample mail merge receipts provided with the program are generally close imitations of the built-in receipt formats. There is one for every type of receipt that you can select via the Receipt Style / Location options in **Maintenance** ⇒ **Receipt Options** (Canada, Quebec bilingual, Quebec French only, U.S.A., Australia DGR, Australia non-DGR, New Zealand and Other). If you leave the checkbox in the **Letters** menu option you are using checked for using the standard names for the Letter, the correct receipt mail-merge files for each of those locations are selected automatically. (And those standard names are *always* used if you select "Create Receipts via mail merge instead of normal report method" and then use the

**Receipt** menu options to create the receipts.) However, you should definitely edit the sample receipt template letters the first time you use them, to confirm that you like the formatting, or to change them as desired.

All of the sample receipts include any logo bitmap specified in the Logos and Signatures [window](#), in the top-right corner of the receipt. They also include any bitmap version of your signature specified in that window, above the signature line. You do have to either manually sign your receipts, or include a graphic file with the signature.

The Canadian (including Quebec) versions of the sample receipts (receipts\_merge\_canada, receipts\_merge\_french, and receipts\_merge\_bilingual) all potentially include three amount lines, for the Total Amount of the donation, the amount of what is called the "advantage", and the Eligible Amount. This is to satisfy the Canada Revenue Agency's requirements on "split receipting", for donations where the donor receives something back in return (called an "advantage"), for instance like at a fundraising dinner. However, for receipts where there is no advantage, only the row for eligible amount of the donation will be shown.

In the less common case where your organization generates a receipt for each individual donation (rather than having receipts that include multiple donations), it is also possible to use the "Donation Information only" option in **Letters ⇒ One Letter** to generate a mail-merged replica of an existing receipt. The advantage of this over using the "Receipt Information" option is that you can also print the donation's Category, Cheque No / Paid By, and Description fields on the main part of the receipt, not just in the Details Table. Several of the fields from the receipt (Receipt Number, Receipt Date, Receipt Type, and Signatory Name) are also included in the "Current Donation Information" option in order to make this work. This may be a good option for specialized receipts such as ones for Gifts In Kind, where the Description is important. (But see the section on [Handling Gifts in Kind](#), and the paragraph below, for a better way to do this for Canadian users.) You could also use it in other cases where you wanted to print the Description, such as in-memoriam donations (with a description such as "In memory of my dear friend, Jim Smith"). At this point, however, no sample letters like this are provided, so you will have to create them.

It might also be possible to do the same thing using the "Individual Donations Information" option in **Letters ⇒ Mass Mailing**, though it might be more complicated in that option to make sure that only the right receipts (and no duplicates) were being generated. (You would probably have to use an appropriate Filter to restrict the letters being generated.)

If you are in Canada, then the separate [gift in kind receipts](#) that you generate with the **Receipt ⇒ Gift in Kind Receipts** sub-menu option can also be created via mail-merge, because there are special versions of the mail-merge letters for that as well.

#### Warning about Editing Mail-Merge Receipts before Emailing

You can [email](#) mail-merge receipts to donors with email address, with the **File ⇒ Email/Print** menu option or corresponding toolbar button, after they are displayed.

If you are sending receipts by email to more than one donor, there is no point in making any edits to the documents before you start the Email/Print process, because they will be lost. (An example of why you might want to make such edits would be to further personalize the receipts.)

The reason there is no point in doing that is that the program re-generates each mail-merged receipt one at a time, before saving it as a PDF and attaching it to an email to the relevant donor. As a result, any prior edits are lost.

If you do want there to be edits, you should either make them in the mail-merge receipt template (if they apply to all donors), or only generate one donor's receipt at a time, in which case any changes you edit in before starting the Email/Print process **will** be included in the PDF attachment.

Any edits you make are always included if you only Print the receipts, rather than choosing the Email/Print option.

#### Warning about Ways of Printing Mail-Merge Receipts

In general, whether you are using the mail-merge or the built-in receipts, a receipt gets saved back to the database if you print it, save it to PDF, or [email](#) it. If you don't do any of those, then when you exit the window displaying the receipt, you get a message explaining that the receipt won't be saved back to the database.

Unfortunately, there are two ways of printing mail-merge receipts that the program cannot know means they were printed, so if you use those ways, the receipt won't get saved when you exit the window. This is something we have no way to fix because of the technology being used for mail-merging.

The first way is if you press **Ctrl+P** to print, rather than using the **File** ⇒ **Print** menu option, the **Print** toolbar button, or **Alt+P**, all of which are fine. So please do **not** print mail-merge receipts with **Ctrl+P**.

The second way is if you use **File** ⇒ **Print Preview**, then Print from within the window that comes up. So again, while you can use Print Preview if you want to see what the receipt will look like printed, please do **not** print from that preview window. Exit the preview window, then print normally.

#### Adding a Letter Before or After the Receipt

Here are some instructions if you wish to add a letter with mail-merge fields in it to your mail-merge receipt, rather than just some additional text on the same page as the receipt. Most of the steps are in order to get a basic letter template, copied from the Donor Information Only letter, as a start to your letter.

If you do not need mail-merge fields in the document you want to add to your receipt, you may not want to choose this method. For instance, suppose what you want to add is a fixed document, such as an annual report. Instead, you could attach that as a PDF file as an Optional Attachment if you are emailing the receipts, and print it separately and include it in the envelopes if you are printing and mailing the receipts normally.

**Note:** There is also a quick video demo of adding a letter to a mail-merge receipt template on the [Demos and Samples](#) page on the website.

1. Make sure you have set up to use mail-merge receipts, as explained above.

2. Go to **Letters** ⇒ **One Letter**. In section 1 check “Donor Information Only”, make sure the checkbox in section 2 for “I want to use the standard names ...” is checked, then click the **Edit** button.
3. If there are any images (such as a logo or signature) in that letter, click them to select them, then press **Del** or **Backspace** to delete them. (This avoids problems later. The images can be re-inserted into the receipt with appropriate **Insert** menu options.)
4. In the [editor](#) that comes up, press **Ctrl+A**, which highlights everything, then **Ctrl+C** which copies that all to the Windows Clipboard. (You won’t see anything happen when you press Ctrl+C.)
5. Close that editor window. If it prompts you to save changes, don’t save.
6. Back in the Merge One Letter window, change section 1 to check “Selected Receipt information”, then click **Edit** again.
7. In the editor, use either **Insert** ⇒ **Page Break** ⇒ **At Start of Document** (if you want the letter to precede the receipt, which we think is most likely) or **Insert** ⇒ **Page Break** ⇒ **At End of Document** (if you want the letter to follow the receipt).
8. It will have put in the page break plus “(Insert text for new page here.)”, already highlighted. Use the menu option **Edit** ⇒ **Paste** (do **not** use **Ctrl+V**) to replace it with the text of the Donor letter, that you copied to the clipboard, in its place.

If the pasted in letter contents included any images, they will be removed and replaced with "IMAGE REMOVED", because they would crash the program. A message will explain that you can re-insert those images with an appropriate **Insert** menu option.
9. Edit that letter that you pasted in as desired - it will only have had sample text that we provided, unless you had already customized that donor letter. You can insert any additional merge fields you want into the letter, with the drop-down list of fields above the editing area and the Insert button beside it. (Some fields in our sample Donor letter probably aren’t in the list of receipt merge fields, specifically «TotalAmount», «LastYearAmount» and «PledgeAmount», so you would have to remove them.)
10. Save the change, exit the editor window, and exit the Merge One Letter window.
11. Try it out with **Receipt** ⇒ **Current Donor Sample**. If further edits are desired after you see how it looks, you can most easily get back to the editor for the receipt by using the **Maintenance** ⇒ **Receipt Options** [window](#), using its **Edit Mail Merge Receipt** button.
12. If you are in Canada, there are four variations of the mail-merge receipt, for donations with and without [Advantage](#), and for "cash" gifts versus [Gifts in Kind](#). You will have to make the same edits to all of them, if you want the same letter included with them. They can all be accessed from the options on the **Maintenance** ⇒ **Receipt Options** window.

### Generating Receipts with Multiple Mail-Merge Template Files

Some users will have multiple mail-merge template files (created in the **Letters** ⇒ **One Letter** [window](#) or **Letters** ⇒ **Mass Mailing** [window](#), with the Advanced features there) for use for



different fundraising events or for other similar reasons. However, you cannot directly create receipts with anything other than your standard-named receipt template (for instance `receipts_merge_canada` for Canadian users' non-Gift in Kind receipts). You can see what the standard template is by going to one of those windows, selecting Receipt Information in section 1, and being sure the "I want to use standard names ..." checkbox is checked in the section where the template name is displayed.

To print, save to PDF, or email receipts using an additional template that you have created with a different name, you must follow these steps:

1. Use your desired **Receipt** menu option to generate whatever receipts you want. They will show up with the standard template.
2. Save what was generated to PDF with the **Save PDF** toolbar icon or menu option. (That causes the receipts to be saved back to the database – you don't really need the PDF itself.)
3. Note the receipt number(s) you just generated, and exit the receipt display window.
4. Go to **Letters** ⇒ **Mass Mailing**, pick Receipt Information in Section 1, make sure "I want to use standard names ..." is unchecked in Section 4, and pick your desired template.
5. Click **Merge**, and when prompted, enter the range of receipt numbers you want to reprint (the ones you generated in the steps above).
6. Process those displayed receipts as desired (usually **Print**, or **Email/Print**).

## 18.8 Generating Mailing Labels using Mass Mailings

Most users will be completely satisfied with the built-in label and envelope reports in DONATION. See the sections on [Mailing Labels](#) and [Envelopes](#) for more details on these reports.

However, in some limited cases you may want to generate your own mailing labels or envelopes, perhaps because you want different information included on them, you want to use a size of mailing labels or envelopes that isn't supported by the above reports, or you want to use a different font.

One way to do that is to export the desired data from DONATION, then do your own mail merge in your word processor. See [Exporting Data from the Program](#) to learn your options for exporting data. For this purpose, the best option is to export to Excel. (If you use **Letters** ⇒ **Mass Mailing** to do the export, which is one of the options in that Exporting topic, it exports to a CSV file, but then gives you an option to open that in Excel. From Excel, you can re-save it as a regular Excel file.)

The following mail merging instructions work for Word 2010 or later. The same type of actions may be possible with WordPerfect or other word processing programs, but truthfully, we just haven't tried them.

Microsoft actually has an online article and video about creating mailing labels using Word, with your data coming from an Excel spreadsheet (or various other sources), at <https://support.office.com/en-us/article/print-labels-for-your-mailing-list-276a2cd1-74d2-43d0->

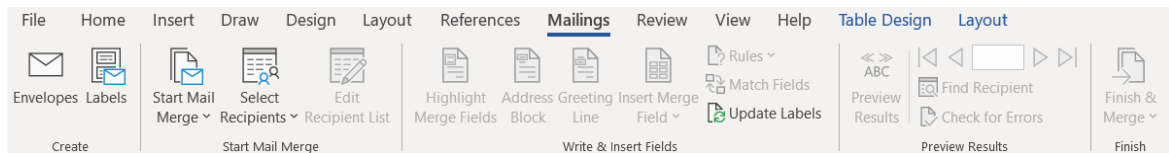


[ab5a-b90460358ad5](#). It may make more sense to follow its instructions than the ones in the rest of this help topic.

Word for Office 365, Word 2019, Word 2016, Word 2013 and Word 2010 Details

The steps that you can follow in these versions of Word have been summarized below:

- Start Word with an empty document and click on the **Mailings** heading to see its ribbon:



- Click on **Start Mail Merge** to drop down its list of options. One possibility at this point is to pick **Step-by-Step Mail Merge Wizard...** from the list. That wizard will also take you through all the steps required for merging your data to create the label, envelope or other document you want. If you choose this, just follow those prompts and you can ignore the rest of this section.
- Otherwise, if you want to do this more manually, from the **Start Mail Merge** drop down list choose **Envelopes...** or **Labels...** That brings up an appropriate **Options** window for your choice. The rest of the instructions below assume you are working on labels, but similar steps would apply for envelopes or other types of merges.
- The next step is to choose which data that Word mail merge is supposed to use. You do that by clicking on **Select Recipients** and navigating to the folder where you stored the Excel file you exported from DONATION.
- You can now create the template for the labels. In this case, you may just want the address block as your base. You do that by clicking on **Address Block** in the ribbon. In the window that pops up, please select all the requirements of the address that you want. You will notice that there is a preview window that will give you a sense of how your label will look. If you are satisfied, click the **OK** button. This will add the merge code «AddressBlock» to the main preview window for the first label. You can insert other fields by clicking on **Insert Merge Field** in the **Mailings** ribbon.
- You can then click on **Update Labels** to fill in all the labels.
- You can click **Preview Results** to see the results of the merging.
- At this point you can edit the data from DONATION. An example of why you may want to do that might be if you have a long list and you want to break the printing of the labels up for better management of that process. In this case, you can click on **Edit Recipient List** and add, remove, filter, sort, find and remove duplicates, validate addresses (this function may need a Microsoft add-on) and other functions before the final merge.
- The final step is to click on **Finish & Merge** (then choose the appropriate option under that, such as **Print Documents**) to complete the merge in Word.

## 18.9 Doing Mail Merges using Save As from Reports

A mail merge is when you send the same letter to a group of donors, with their names and addresses, and possibly other data, filled into the letter to personalize it.

Prior to version 2.28 of the program, the instructions further down in this Help topic were the only method by which mail merge letters could be created from DONATION. Because it requires more steps and more knowledge of the mail merge features of your word processor, and is more limited in its capabilities, this method is no longer recommended. Instead, we strongly recommend using the methods shown in [Creating Letters for One Donor](#) and [Creating Mass Mailings](#), using the **Letters** menu options.

One major limitation of doing mail merges directly in your word processor, instead of using the built-in **Letters** menu options for mail merging, is that you cannot include the «DetailsTable» and «SummaryTable» [merge fields](#) that are available in the internal editor.

However, these instructions are still included for those that have used them in the past. They might also be helpful in the rather unlikely case where some information from an existing report in DONATION was desired in a mail merge letter, that was not available using the options on the **Letters** menu.

See [Exporting Data from the Program](#) to learn your options for exporting data from DONATION, which you can use in mail merging. For this purpose, the best option is to export as "Raw Unformatted Data" to Excel. (If you use **Letters** ⇒ **Mass Mailing** to do the export, which is one of the options in that Exporting topic, it exports to a CSV file, but then gives you an option to open that in Excel. From Excel, you can re-save it as a regular Excel file.)

It is beyond the scope of this manual to explain in full detail to you how to do mail merges in arbitrary Word processors.

However, if you are using Microsoft Word, there are instructions in the Help topic [Generating Mailing Labels or Envelopes using Mail Merge](#) for doing that in Word. While those instructions refer specifically to labels or envelopes, they can also be used for letters.

## 18.10 Backing up and Restoring Letters Files

Prior to version 3.66 of DONATION, mail merge letter and receipt files were only stored in the Letters subdirectory of the [data directory](#) of the computer on which you installed DONATION. As a result, there were several situations where you might need to move edited files from one computer to another, including if:

- You are [Moving the Program from One Computer to Another](#).
- You use the program on two computers (for example home and office), and you want to transfer customized letters from one computer to the other so they can be used in either place.
- You use the program on a [network](#), and you want to transfer customized letters from one of your computers running DONATION on the network to another.

Starting in version 3.66, however, the mail merge letter and receipt files are stored in your database, and only extracted to the Letters directory when they are needed. After editing, they are saved back into the database. As a result, the concerns above are entirely eliminated. When you transfer a database to another computer (or with the [Local Network](#) Version or [OnDemand](#) Version, access the same database from multiple computers) the letters automatically come with the database, so no further actions are required.

So as of version 3.66 and later, the previously needed **Letters** ⇒ **Backup** and **Letters** ⇒ **Restore** menu options are no longer needed, and have been removed from the program.

## 18.11 Using Mass Email Services

There are four possible ways to send mass emails to your donors.

The first way to send mass emails is done through the program, as explained under [Emailing Receipts, Letters and Statements](#). That has the advantage of allowing you to merge virtually any information in the program into those letters.

Another way, if you just want to send the same email to all donors with email address, optionally with a PDF attachment such as a newsletter, is to use the **Letters ⇒ Email Donors menu option**. This is a simple way to email to all or some donors, with limited merging of donor information in the Subject and Body of the email available.

However, for large numbers of donors (many hundreds, or particularly if you have thousands of donors) doing mass emails from your own computer can run into dangers of your Internet Service Provider (ISP) or the ISPs of your recipients classing you as a spammer, and not allowing your emails to go through.

For emails with little or no merging required, like newsletters, another option, which significantly decreases the danger of being classed as a spammer, is to use a mass mailing service such as [Constant Contact](#), [Vertical Response](#), [MailChimp](#), or [Campaign Monitor](#) (which is the one that we here at Software4Nonprofits currently use for our mass emailing).

Unlike the **Letters ⇒ Email Donors** menu option, those services generally do **not** allow you to add attachments to the emails they send. The emails you sent through them will generally be designed in HTML (though text-only emails are usually also supported). The design of the HTML for the emails can be done by you outside of the service, though they often also have facilities for designing emails based on templates that they (or you) create, without having to know much or any HTML.

To use such a mass mailing service like Constant Contact, you need to upload email addresses, and whatever other information you want the service to be able to merge into your emails, from DONATION into that service. You do that by selecting the desired fields in the **Reports ⇒ Custom Report window**, running the report, then using the [Save As](#) button to save it to a file format that you can import into the service (probably tab-separated Text).

Be sure when choosing your fields in the Custom Reports window to only select one row of data per donor - if you include things like donation detail fields, you will get more than one row of data per donor, which will not work, because the mass mailing services will only accept one row for each email address.

Of course, it is your responsibility to figure out how to best use a mass mailing service, and to choose the right one for your organization. We cannot help you with that, only with exporting the data for use in the service.

One thing to keep in mind is that if you keep uploading exported lists of donors to the mass emailing service, unless you delete the list in that service before each upload, any donors you have deleted in DONATION will still exist in the service. So when you delete donors from DONATION, you may have to go online to the service to also delete them there as well, to make sure they do not keep receiving your mailings.

An advantage of **not** deleting your list before each upload of donor information from DONATION is that the services generally keep track of which emails have been sent to whom, and when possible they also tell you who has opened each email. If you delete the list, you lose that past information.

## 18.12 Emailing Donors

The menu option **Letters ⇒ Email Donors** can be used to send an email to all donors with email addresses, optionally including the same PDF file as an attachment. That optional attachment might be a newsletter, or perhaps a fundraising document.

**Note:** Prior to Release 4.37 of DONATION, this menu option was split into two: **Letters ⇒ Email Everyone** that allowed you to send an email with no attachment, and **Letters ⇒ Email Newsletters** that allowed you to send an email with an attachment. Now the one menu option **Email Donors** handles either process.

Of course, when we say "donors", they do not have to have actually donated any money - they just have to be on the Donor List in the program.

While the options described here allow you to email a fixed PDF attachment to donors as an attachment, with no merging, or just a plain email with no attachment, there may be cases when one of the other methods for emailing to donors from DONATION ([Emailing Receipts](#), [Letters or Statements](#), or [Using Mass Email Services](#)) would be more appropriate. Please see [Using Mass Email Services](#) for a full discussions of the pros and cons of each method.

Before you can use **Letters ⇒ Email Donors**, you need to [configure email sending](#) from the program, via the **Maintenance ⇒ Email Sending Configuration** menu option.

When you use the **Letters ⇒ Email Donors** menu option, the following window will come up:

Email Donors

1. Specify whether you want to be given a chance to select only a filtered selection of the retrieved donors.

☒ I want to filter the donors before emailing them

2. Select a desired PDF attachment if you want one included with your email:

**Browse**

**Email** **Help** **Close**

If you have sent emails with an attachment with this window before, the last-used PDF attachment filename will appear in section (2) when the window appears. If that does not happen, or the filename that appears is not the file for the current attachment that you want to

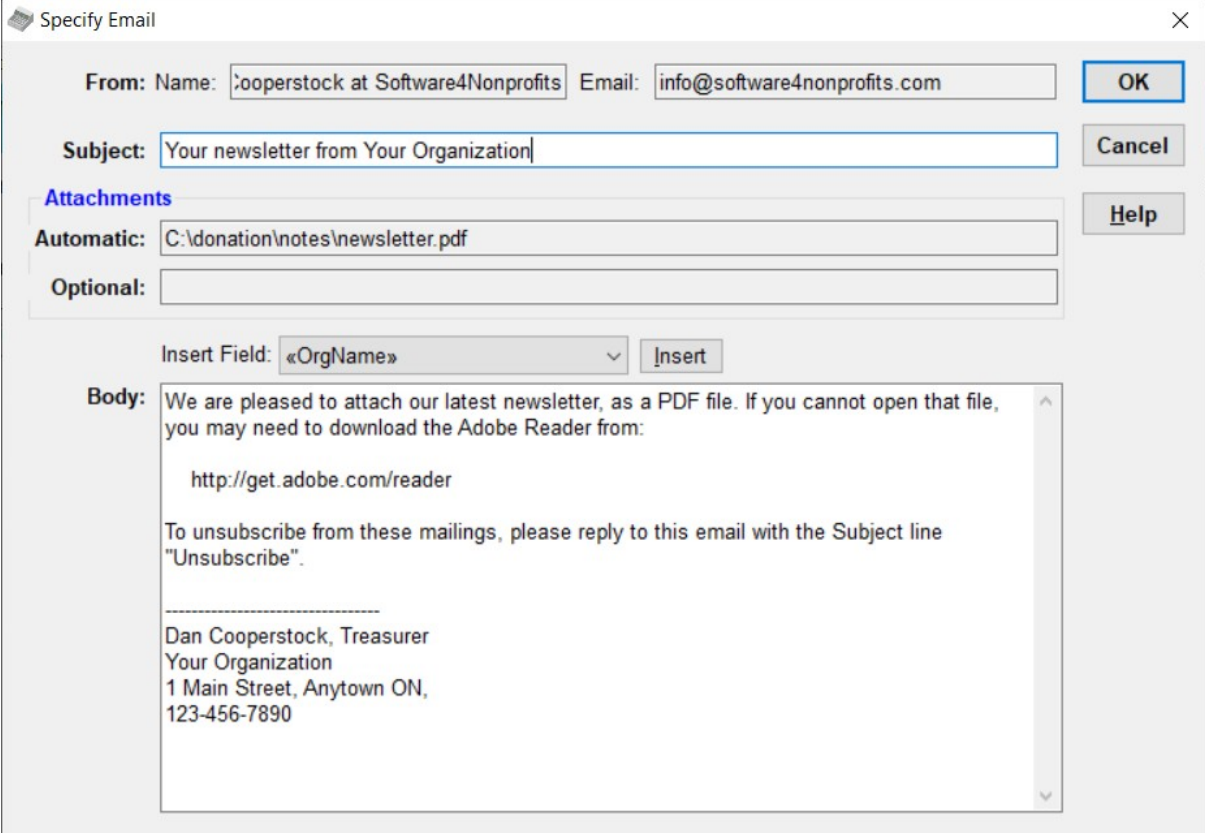
send out, you can either type the desired filename into that field, or click the **Browse** button to select the desired file. If you don't want an attachment sent with this email, just delete anything in that field.

Normally this window sends the emails, with the optional attachment, to all donors who have email addresses. However, there is an option to filter (select) them based on the contents of various donor fields, if you check the checkbox in section (1) of the window. See [below](#) for details.

Another option that affects what happens in these windows is the "Email receipts, letters and statements only to yourself, for testing" checkbox in the **Maintenance ⇒ Receipt Options window**. Although that option doesn't explicitly mention other emailing, it does apply here as well. If it is checked, when you go to email in these windows, it will only send one, to your email address as set in the **Maintenance ⇒ Email Sending Configuration** window (though the "To" name will be the name of the first donor). A message box will explain that fact when you click **Email** in this window.

When you are ready to start sending the emails, click the **Email** button. As explained in the section below, if you checked the checkbox in section (1), you will first be shown the donors who will receive the emails, and then if you also click **Email** in that window, the emailing will start.

Before the emailing starts, the following window comes up to confirm the Subject line and Body of the email that will be sent to the donors, with any attachment that you specified shown as the Automatic Attachment:



The image shows a "Specify Email" dialog box with the following fields and content:

- From: Name:** Cooperstock at Software4Nonprofits
- Email:** info@software4nonprofits.com
- Subject:** Your newsletter from Your Organization
- Attachments:**
  - Automatic:** C:\donation\notes\newsletter.pdf
  - Optional:** (empty field)
- Insert Field:** «OrgName» (dropdown menu)
- Insert:** (button)
- Body:**

We are pleased to attach our latest newsletter, as a PDF file. If you cannot open that file, you may need to download the Adobe Reader from:

<http://get.adobe.com/reader>

To unsubscribe from these mailings, please reply to this email with the Subject line "Unsubscribe".

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Dan Cooperstock, Treasurer  
Your Organization  
1 Main Street, Anytown ON,  
123-456-7890

Buttons: OK, Cancel, Help

If you did not specify an attachment, "n/a" (for "not applicable") will appear in the Automatic Attachment field. You cannot use the Optional Attachment field in this case (it is available when [emailing receipts](#) and mail-merge letters).

The From Name and Email address in this window will be your name and email address, as [configured](#) in **Maintenance** ⇒ **Email Sending Configuration**. The signature block at the end of the Body will be based on what you have entered in **Maintenance** ⇒ **Organization Info**. However, you can edit the Subject line and Body to be however you want them to be. The Body is normally just plain text, so you cannot include fonts or images, but see below for an exception. Your edits to the Subject and Body will be saved for the next time you email with this menu option. Please note that once they have been saved once, even if you change the organization info in **Maintenance** ⇒ **Organization Info**, the signature block in the Body will not change - you will have to also change it there, the next time you send emails.

In terms of what is memorized for the Subject and Body for the next use, the program actually memorizes and re-uses one pair of those values for emails you send with no attachment, and a different pair for emails you send with an attachment.

The "Insert Field" drop-down list above the Body contains most donor data fields. Selecting a field from that list then clicking the **Insert** button inserts that merge field at the current cursor position in the Body. If you insert fields in that way, each email body will be personalized using that donor's data for the inserted fields. Probably the field you would most likely insert would be «Name», the donor's full name (or business name, if there is one). For details on all of the available merge fields, see [Mail Merge Fields](#) - the available ones are the Common Donor and Organization Information fields, and also the specific Donor Information fields.

Although the **Insert** button only inserts fields directly into the text Body of the email, you can actually cut or copy and paste them from there into the Subject line for the email, and that will also cause the donor's data to be merged into that Subject line.

You can actually send the Body of the email as HTML, if you are very familiar with it, by having "<html>" (without the quotes) as the very first thing in the Body, and ending it with "</html>". Of course, other appropriate changes have to be made to make it valid HTML that will display well, and you need to be cautious with what HTML elements you use, because not all email programs and devices display complex HTML well. See [below](#) for more details.

After clicking **OK** in that window, the program will start to send the emails to each donor with an email address (or each one left after any filtering you did).

As it works, the name of the person to whom the current email is being sent will be displayed, above the **Email** button on the main email sending window. When the emails have all been sent, you will receive a message saying how many were sent. While the emailing is going on, the **Close** button changes itself to say **Cancel** - clicking that button stops the emailing after the one that it was currently working on when you clicked it.

As always, you can click **Help** in this window to see this Help page, and you can click **Close** or press **ESC** in this window to close the window. You are returned back to this window when the emailing is finished, after which you will need to close the window.



**Note:** Because the emailing is done by an email sending component that is part of DONATION, with no connection to any email program that you use normally (such as Outlook), there is no record of which emails were sent to which donors in the Sent Mail folder of your email program. To get a blind copy of each email that is sent, you can check the "Bcc: to yourself" checkbox in the **Maintenance** ⇒ **Receipt Options** [window](#).

### **Filtering or Reviewing Information Before Emailing**

In section (1) of this menu option's window, you can check a checkbox labelled "I want to filter the donors before emailing them". If you check this, you will be shown the selected information for all donors in a window similar to DONATION's reports viewing window, after you click on **Email**. From that window, you can click the **Filter** button if you wish, and enter filter criteria to determine which of the donors the emails should be sent to. See the section on [Filtering Reports](#) for more information on how to use this.

Using this checkbox option and window can also be helpful just to see the names and email addresses that the emails will be sent to, before you send them, even if you have no need to filter it further.

Click **Email** in that window when you are satisfied with the data, or **Cancel** if you decide you don't want to send the emails for the displayed donors.

One example of when you might use filtering is if you use the Donor Category 1 field to classify donors as Members or other statuses, and want to send the emails only to your members.

If so, in the window for emailing newsletters or emailing everyone, after specifying the desired newsletter file if necessary, check the checkbox for filtering, then click **Email**. In the window showing the selected donors, click **Filter**. In the Filter window, enter the following as the options:

Column	Operator	Value	And/Or
category1	Equals	Member	

Click **OK** in that Filter window, and the data will be redisplayed, but only including the matching donors. Click **Email** in that viewing window, and the emailing will be done, but including only those donors who had that value ("Member") in their Category 1 field.

### **Warning about being classified as a SPAMmer!**

If you have very large numbers of donors with email addresses that you send emails or newsletters to, it is possible that either your Internet Service Provider (ISP) or the ISPs of the recipients of your emails will classify you as a spammer, when you send lots of emails very quickly as the program can do. This is a general problem with sending large numbers of mass emails, and is very hard to work around.

It is impossible to give a specific number of emails at which this might start being a problem. In our experience sending emails to the users of the DONATION program, we started observing the problem when we had a few thousand users. But we would guess that the problem could start when you email quickly to as few as a hundred donors.



There is unfortunately no simple way to get around this problem. (We get around it by using a commercial [mass email sending service](#), that works closely with all ISPs to ensure that their emails are not classed as SPAM. But you couldn't use an email-sending service to send a previously prepared PDF newsletter to each donor - they generally do not allow attachments.) So, if you do have very large numbers of donors with email addresses, you may want to think carefully about whether or not to use this feature for sending emails or newsletters from within DONATION.

One thing that might help would be to send the emails in smaller batches, and only do a certain number per day. You would do that with filtering, as described above. We cannot in any way guarantee that this will prevent you from being classified as a spammer, but it makes sense that it might help.

It's also possible that your ISP will restrict you to sending a certain number of emails per day, or a certain number within a given period of time (like an hour), even though they aren't classifying you as a spammer for trying to exceed that.

If you do have large numbers of donors with email addresses, one thing you could do is to talk to your ISP about their sending limits for emails, or email with attachments if you are doing newsletters. Ask what quantities per day or hour you need to limit yourself to, to prevent your ISP classifying you as a spammer, and adjust your email sending accordingly.

#### Using HTML in the Body

As mentioned above, you can actually send the body of the email as HTML, if you are very familiar with it, by having "<html>" (without the quotes) as the very first thing in the body, and ending it with "</html>". Of course, other appropriate changes have to be made to make it valid HTML that will display well, and you need to be cautious with what HTML elements you use, because not all email programs and devices display complex HTML well.

As soon as you prefix the body text with "<html>", a button appears saying **Show HTML in Browser**, right above the editing area for the body. Clicking that will display the body in your default web browser (such as Internet Explorer, Firefox or Chrome), so you can see how it looks. However, complex HTML may look fine in your web browser may not come out well in all email programs.

See the Help topic [HTML in Emails to Donors](#) for some very simple examples and instruction.

#### Handling halts in the emailing

If your Internet Service Provider, through which you are sending the emails, immediately reports back to the email software used by DONATION that one of the email addresses you are sending to is invalid, you might get an error message causing the process to halt. The message will tell you who the last person was that received the email successfully. You will want to fix the bad email address (if possible) and resume sending later at the same or following email.

So the first thing you do is exit the emailing window, and fix that email address on DONATION's main window, or remove the email address. Then restart the emailing, and use a Filter to eliminate the names that it was previously successful for.

Because the sort order in the displayed donors is by the "Name" field, which is the business name if there is one, or otherwise the first name then last name), it would be quite easy to devise a filter to resume at the desired person. (See [Filtering Reports](#) for details.) For instance, to resume at "Dan Cooperstock", use the filter:

Column	Operator	Value	And/Or
name	Greater Than or Equal To	Dan Cooperstock	

Click **OK** in the Filter window to display just those donors that satisfy the Filter condition, then click **Email** in that data viewing window to do the emailing.

#### Allowing for and Handling Unsubscribes

Depending on your local laws, and perhaps on the contents of the text part of your email and the PDF file you are attaching, your emailing may be covered by anti-SPAM legislation. Even if not, out of courtesy you should probably make it clear to your users how to unsubscribe from receiving your email newsletter mailings.

Because the emailing is being done by this program that is installed on your computer, rather than a web-based service, there is really no clear way to automate the handling of unsubscribes. That's why the default text body of the email, as shown in the window above, includes a sentence about unsubscribing by replying to the email with the Subject line "Unsubscribe". Of course, you can change that however you wish, or remove it if you do not feel it is necessary or appropriate.

If you do leave something like that in (or if email recipients contact you anyways to ask to be unsubscribed from your mailings) you will need to determine how to handle it. If the person hasn't donated anything, and the only reason they were entered as a "donor" in DONATION was to get them onto the mailing list, one option would be just to delete their donor record. But more likely you will want to somehow mark up their donor record, perhaps with a selection in one of the two [donor category](#) fields, or with a code in one of the six renameable Other Info fields (set up on the **Maintenance** ⇒ **Main Window Options** [window](#)). Then when you do further mass emails, you can use the capability to Filter the donors before sending, to exclude those donors who have unsubscribed, based on how you coded them. See [Filtering Reports](#) for details.

#### Mailing to Donors with No Email Address

You will probably want to also mail a printed newsletter to your donors that don't have an email address, by regular postal mail. To make that easier, you can print [mailing labels](#) or [envelopes](#) for them, with **Reports** ⇒ **Donor** ⇒ **Mailing Labels** or **Reports** ⇒ **Donor** ⇒ **Envelopes**, being sure to check the checkbox for "Skip donors with email addresses" on the window that comes up prompting for whether to send them to all donors or only donors with donations within a specified date range.

## 19 GENERATING CHARITABLE RECEIPTS

### 19.1 Generating Charitable Receipts

Before reading this page, which contains an overview of receipting, you may want to review the page on the **Receipt** [menu](#), to get an quick notion of the menu options to be discussed.

Receipts are the name that the DONATION program gives to the documents sent to donors that show what to claim on their taxes for their charitable deduction based on their donations to your organization. There is another help topic titled [Statements and Receipts](#) that talks about the difference between those two concepts and your options for sending things to your donors both mid-year and at year-end.

In the U.S.A., what the program calls "receipts" are also frequently called "contribution statements".

#### Initial Setup

Organizations should always go to the **Maintenance** ⇒ **Receipt Options** [window](#) to specify which country or province they are in, as part of their initial setup. This will guarantee that they get the correct receipt format, because there are a number of different receipt formats for different places. There are also a number of other options on this window that you should review.

You can use a [bitmap logo and/or a bitmap signature](#) on your receipts - you set that up on that same window.

Organizations that want to have their charitable number (officially called Business # in Canada, Tax ID/EIN in the USA, ABN for Australian DGR organizations and Charities Commission Number for New Zealand organizations) on their receipts should enter it on the **Maintenance** ⇒ **Organization Info** [window](#). This is required in Canada, and optional in the USA (some charities prefer to show it on the receipts, others prefer not to).

The name of the person who will be signing the receipts (or whose name is in the bitmap signature recorded, as mentioned above) is also entered or updated on the **Maintenance** ⇒ **Organization Info** window.

Finally you may choose to set a [Receipt Password](#), with the **Maintenance** ⇒ **Change Password** ⇒ **Receipt Password** menu option. If you do that, you will be required to supply it before you are allowed to create, correct or delete receipts. You can do that by entering it when the program starts up (if you have also set a Program Entry password), or when you do a **Receipt** menu option that requires it.

#### When to Issue Receipts

Most organizations will choose to issue all of their receipts after the year end. Current Canadian government regulations recommend that they be generated and distributed to donors by the end of February. The IRS in the USA recommends that they be sent by the end of January. Other countries may have other deadlines. However, you can also generate a receipt for one donor at a time at any time during the year.

It is very important to understand that once a donation has been included on a receipt in a given year, it will not normally be included on any further receipts for that donor that year - they are not cumulative. That is to prevent accidental double-claiming of total donation amounts by donors on their taxes.

You should probably never issue receipts for a given donation received by cheque until you have deposited the cheque and given time to make sure it is not NSF. If a cheque does come back NSF before you receipt it, just delete that donation for that donor. (You could alternatively change its Amount to \$0, and change its Cheque # / Paid By field to "Non-Receiptable", to prevent it from appearing on any receipt.)

If you are in a country such as the United Kingdom, Australia or New Zealand, and have turned on [Fiscal Year Data Entry and Receipting](#) and are working in a fiscal year, you would do any full-fiscal-year receipts after your fiscal year end. In this case, receipts can include donations in your current working year, which is the fiscal year.

### Receipt Numbering

Receipts are numbered sequentially within a year. For instance, for the year 2017, the numbering starts at 2017-00001 and goes up to at most 2017-99999. Once a donation has had a receipt issued for it, the receipt number (without the part for the year and any leading 0's) appears in the Recpt # field for that donation, in the Donations area of the main window.

The Recpt # field in the donation details area, field cannot be entered directly. It only gets filled in when you generate a receipt that includes that donation, by using one of the **Receipt** menu options, and you save the receipt back to the database by printing it, saving it to PDF, or emailing it. Only the second part of the receipt number is displayed in the "Recpt #" field, for example 1 is displayed if that donation was part of receipt number 2017-00001.

See a section below for the receipt numbers used with Fiscal Year Receipting.

### Individual Receipts

To generate a receipt for one donor, [find the donor](#) then use the **Receipt ⇒ Current Donor Original** menu option. This creates the receipt for all [receiptable](#) donations from that donor in the current working year that haven't yet been included on a receipt. (All other means of creating receipts also exclude any donations that have already been included on a previous receipt.) The receipt is displayed on the screen, and you can print it, save it to PDF, or [email](#) it. If you print it, you will be prompted as to whether you want to print a second copy for your records.

**NOTE:** The appropriate person whose name is printed on the receipts (entered as "Receipting Person" in **Maintenance ⇒ Organization Info**) must sign the receipts for them to be valid. (I believe you can also use a rubber stamp of the signature.) You can alternatively [use a bitmap signature](#).

If you have to enter a lot of donations quickly and you need to immediately hand out a receipt for each one, you can use the **Receipt ⇒ Current Donor Original Quick Print** menu option instead of **Current Donor Original**. That immediately prints the receipt once it is created, doesn't prompt about printing a 2nd copy, and closes the receipt-viewing window, without giving you a chance to look at the receipt first. You do get a message telling you the receipt number and that it has been send to your default printer.

For your initial testing, you can instead use the **Receipt ⇒ Current Donor Sample** option, which creates a sample receipt (with "SAMPLE ONLY" as a large watermark on the page), and does not store the receipt back to the database in any way, so the Recpt # field for the donation never gets filled in. Because sample receipts are never saved back to the database, they will all have the same receipt number (number 1 if you haven't generated and saved any real receipt prior to that).

**For Canadian users only:** Donations with Advantage must be one receipt per donation, so using **Receipt ⇒ Current Donor Original** may generate multiple receipts if there is more than one donation with Advantage for the current donor that have not previously been receipted. If there are both donations with Advantage and donations without Advantage for the current donor, you will be asked which type of receipts you want to generate, because both types cannot be generated together. The same applies to any of the other menu options described below for generating receipts for multiple donors. Please see [Donations and Receipts with Advantage](#) for full details of all of this.

#### Printing and Saving Receipts

If you don't print receipts that you have generated and you then exit the window on which you are viewing them, the receipts are not saved back to the database. (Of course the *donations* included in the receipt will still be saved!) Receipts are also saved back to the database if you email them to donors with the **Email/Print** [button](#), or save them to a PDF file with the **Save PDF** button.

Sample receipts created with the **Receipt ⇒ Current Donor Sample** option are never saved, even if you print them.

Also, if you have the "Email receipts, letters and statements only to yourself, for testing" checkbox in the **Maintenance ⇒ Receipt Options** [window](#) checked, and you only email the receipts you created, they will not be saved, since they haven't actually been sent to donors.

#### Printing for Users in Countries where the A4 Paper Size is Used

Please see the [section](#) on "Options for Countries other than Canada or the U.S.A." in the Receipt Options page for details on how to ensure that your reports, receipts, and mail-merge documents print successfully on A4 paper, if that is an issue in your country.

For Canada and the U.S.A., or other countries when you do not set the option to use A4 Paper in the Receipt Options window as described in that section, all printing is done to Letter-size paper (8 1/2" x 11").

#### Standard vs. Mail Merge Receipts

There are actually two ways to display the receipts once they have been generated. The standard way uses built-in reports. They cannot be edited, but you can make some changes to what is included in them via options in the **Maintenance ⇒ Receipt Options** [window](#).

The other way is to generate them via [mail merge](#). This happens if you check the "Create Receipts via mail merge instead of normal report method" checkbox in that same Receipt Options window. In that case, receipts are generated using standard mail-merge template files that replicate the built-in reports for receipts, and which you can edit. To edit their template

file (that determines their wording and structure), in the **Maintenance** ⇒ **Receipt Options** window, click the **Edit Mail Merge Receipt** button. Alternatively, go to **Letters** ⇒ **One Letter**, select the radio button for Selected Receipt Information, make sure the checkbox in Section 2 for "I want to use standard names ..." is checked, and click **Edit** beside the name of the Letter File. (These two methods do exactly the same editig.) You can make any changes you wish, then save your changes. See the section on [Generating Receipts using Mail Merge](#) for details.

As well as allowing you to edit the text of the receipts (including [adding a letter](#), if desired), using the mail merge receipts also gives you more flexibility in the size and shape of a [Logo](#) image you may want to add to the receipt.

### Which Donations are Receiptable?

We said above that all "receiptable" donations by a donor that haven't yet been included on a receipt will be included when you generate a receipt for them. There are several ways to mark an entire donor, or individual donations, as Non-Receiptable, so that they will never receive an official receipt (for donors) or be included in an official receipt (for donations). For full details, please read the details on this under [Non-Receiptable Donors and Donations](#).

### Donor Names in Receipts

Both standard and mail-merge receipts always show the Business Name as the donor's name if one has been entered, and otherwise the person's name.

The person's name will automatically include any Title that has been entered if "Include Title in Names in Letters and Receipts" has been checked in the **Maintenance** ⇒ **Main Window Options** [window](#). And it will automatically include any Middle Initial that has been entered if "Include Middle Initial in donor names in receipts" has been checked in the **Maintenance** ⇒ **Receipt Options** [window](#).

Since the Canada Revenue Agency requires Canadian charities to include donors' middle initials with their names on receipts, it is recommended that you enter Middle Initials and check that "Include Middle Initial in donors names in receipts" checkbox. Alternatively, Canadian users (and anyone else who wants middle initials displayed) can just always enter donors' middle initials at the end of the First Name field.

### Year-End Receipts for All Donors

After you have entered all of the donations for a given working year, if you want to create and print off (or email) all of the receipts, choose **Receipt** ⇒ **All Donors** from the menu. This will create receipts for at most 500 donors in one batch (it tells you if it is imposing that limitation). Receipts will be created for all donors who have receiptable donations that have not yet been included on a previous receipt. Again, you can preview them, and after you Print them you are given an option to print a 2nd copy for your records.

If you received the message about printing at most 500 receipts, just go back and run **Receipt** ⇒ **All Donors** again, and repeat until they are all done. The reason we have imposed this limitation is that the way the receipts are generated uses a lot of memory in your computer, and we were concerned that the program might run out of memory if we let it



generate them all at once. Do not worry, you can print all of your receipts no matter how many donors you have!

When you are printing all the receipts, we recommend that you not exit the window displaying them until your printer has finished printing them successfully. That way, if for instance you need to replace the ribbon or ink cartridge and reprint them because you ran out of ink, you will still be able to click the Print button again and print them successfully. But see the section below on Reprinting Receipts if you do exit the window, and your printer fails to print all of the receipts.

**For Canadian Users:** You might have to run up to 4 versions of receipts for all donors, depending on the types of donations you have recorded. If you have cash donations with advantage ([split receipting](#)), and also ones without advantage, you will have to run this twice to generate the receipts for donations with and without advantage. And if you have [Gift in Kind](#) donations, you have to use **Receipt = Gift in Kind Receipts = All Donors**, possibly twice if you have such donations with and without advantage. You can follow the links in the previous sentences for further details.

#### How to be Sure you have Created all Receipts at the Year End

1. Run **Reports = Donation = Unreceipted**. If any data shows up in that report, those donations still need to be receipted!
2. Run **Reports = Receipt = Incorrect** to make sure there aren't any receipts that you have somehow changed (specifically so that the total amount of the donations included in it does not match the original receipt amount), but not yet printed a corrected receipt for.

#### Fiscal Year Receipting

If you are in a country such as the United Kingdom, Australia or New Zealand where the receipting / tax deduction year is different from the calendar year, please see the Help topic [Fiscal Year Data Entry and Receipting](#) for how to set up work with that properly. Doing that setup allows you to do both data entry and receipting (as well as reporting) on a fiscal / tax year basis, instead of the normal calendar year basis done for Canada and the U.S.A. Receipt numbers for receipts in a fiscal year are things like "FY15/16-00001", for the first receipt in fiscal 2015/2016, rather than the normal numbering "2016-00001" for the first receipt in calendar 2016.

#### Reprinting Receipts

If you have a problem printing a batch of receipts, and you have already exited the window displaying them, or you need copies of previously printed receipts for any other reason, you can reprint them with the **Receipt = Reprint Range** [menu option](#).

That option prompts you for the starting and ending receipt numbers that you want to reprint, and then recreates them and gives you an option to print them again. It also gives you options to mark the receipts as Duplicate/Replacement, or Corrected.

#### Deleting Receipts Created in Error

If you have generated a batch of receipts and realize that you did not want to do so, you can delete them with the **Receipt = Delete Range** [option](#). The most common time this comes up



is if you have run **Receipt ⇒ All Donors** in the middle of the year, to look at the receipts, then printed them but not sent them to the donors. When you use **Receipt ⇒ All Donors** again at the end of the year, you find that they only include the donations from each donor that occurred after that first batch of receipts was created, and you really wanted all donations for the year to be on one receipt. As long as you have not distributed those earlier receipts to the donors, or created and given out any individual receipts in the time in between, you can use **Receipt ⇒ Delete Range** to delete all of the old receipts, and then recreate them with **Receipt ⇒ All Donors**.

Instead of creating receipts mid-year, you may want to create a non-receipt report for each donor to show what they have given so far. See [Statements and Receipts](#) for details on doing that.

### Filtered Receipts

You can also print a selected subgroup of all outstanding receipts, or receipts for a selected subgroup of receiptable donations, with the **Receipt ⇒ Filtered Donors** [option](#). This option is most commonly used by users who wish to send receipts only to those donors who have donated at least a certain dollar value.

This brings up a window where you can select criteria based on the Donor (a value of Category 1, a value of Category 2, or some text found in Other Info 1 through 6) or criteria based on individual Donations (a minimum donation Amount and/or a donation Category), or a range of donation dates. All donors and donations matching all entered criteria, which haven't yet been included on a receipt, will have the receipts generated for them. Like **Receipt ⇒ All Donors**, this will print at most 500 receipts at a time. Please read the help page on [Generating Filtered Receipts](#) for full details on this option.

**For Canadian Users:** As with **Receipt ⇒ All Donors**, you might have to run up to 4 versions of filtered receipts, depending on the types of donations you have recorded that match the filter criteria. If you have cash donations with advantage ([split receipting](#)), and also ones without advantage, you will have to run this twice to generate the receipts for donations with and without advantage. And if you have [Gift in Kind](#) donations, you have to use **Receipt ⇒ Gift in Kind Receipts ⇒ Filtered Donors**, possibly twice if you have such donations with and without advantage. You can follow the links in the previous sentences for further details.

### Duplicate and Corrected Receipts

If you have already distributed the receipts and a donor calls up and says that they lost their receipt, or there is a correction to the data in their receipt, you may not just issue another original copy of the receipt (because an unscrupulous or careless donor could submit both to the government!).

Instead, for simple duplicates, select the donor from the Donor List, click on any field in one of the donations included in that receipt, then use the **Receipt ⇒ Current Donor Duplicate/Corrected** function to reprint the receipt. This adds the words "Duplicate Receipt" (or other similar words) to it so that it is clear that this is a replacement receipt. If the donor never received the original receipt, you can avoid the replacement being marked as a duplicate either by checking the checkbox in this window for "Do not change the receipt status to duplicate or corrected", or instead using the **Receipt ⇒ Reprint Range** [menu option](#), which by default does not change the status of the receipt to Duplicate if it is not already marked as a Duplicate.

If there was a correction needed (one of the donations comprising the receipt was deleted, and/or new donations were added that you want to be included etc.) it instead adds the word "Corrected". The duplicate or corrected receipt has the same receipt number as the original.

See [Generating Duplicate or Corrected Receipts](#) for more information, especially about the options for correcting receipts. You can also generate a duplicate or corrected receipt by receipt number, without first selecting the donor and a donation included in the receipt to be recreated, by using **Receipt ⇒ Duplicate/Corrected by Number**.

**For Canadian users:** Duplicate/Corrected receipts for Canada will always come up as two receipts - the original number, now showing as being for \$0 and with wording on it saying it has been replaced by a new one, and a new one with a new receipt number, with the correct dollar amount, and wording saying it replaces the old number. This is required by the CRA. See [Generating Duplicate or Corrected Receipts](#) for full details on this.

#### Receipt Mailing Labels and Envelopes (and Not Window Envelopes!)

You can [print mailing labels](#) to go on the envelopes for the receipts generated on one day by using the **Reports ⇒ Receipt ⇒ Mailing Labels** option. Alternatively, you can print the actual [envelopes](#) themselves, with the **Reports ⇒ Receipt ⇒ Envelopes** option.

The current receipt formats are **not** currently designed to necessarily be able to display the recipient's name and address in window envelopes properly. It's possible that if you were to switch to the [mail-merge version of the receipts](#), you could adjust the receipt formatting until it fit properly, but we cannot guarantee that, because changing the spacing and arrangement of things is not at all easy in our mail-merge editor, and it would not be a part of our normal paid support to assist you with that. We strongly recommend sticking with the receipt mailing labels or envelope printing instead, as described in the previous paragraph.

#### Issues with Including Descriptions in the Details Section of the Receipt

If you have selected the option in **Maintenance ⇒ Receipt Options** to print the donation Descriptions in the details section of the receipt, and you have long descriptions, they may wrap onto two lines, because there is not enough room across the line for the complete description. In some odd cases, where the description is just almost long enough that it needs to wrap, the program may get a bit confused and leave space for two lines of description, even though it does not actually put anything on that 2nd line. Sorry, this is something we can't do anything about. It just looks a bit odd visually.

#### Sections of the Receipt

Receipts for Canada (English) have two sections - a top part that the donor submits with their tax form, and a bottom part for them to tear off and keep for their own records. [Bilingual](#) French/English receipts and French-only receipts for Quebec have three sections, so that one copy can be sent with the Federal tax form and one with the Provincial form. [U.S.](#) receipts do not need multiple sections because the receipt is not submitted with the donor's tax form. (And Canadian receipts don't have to be submitted if you file electronically, though of course you have to have them.) Each section of any of the types of receipt includes the Member/Envelope # for the donor with their name, if such a number has been entered.

The bottom part of the receipt optionally includes details of all individual donations included on that receipt, and also optionally includes a summary of donations by category. If you are including the details section, and you are not including the Cheque No or Description in the details, then if there is more than one donation included in the receipt, they will be printed in two columns to save space. If you include the Cheque No or Description, the details section is too wide to be printed in two columns.

For the built-in receipts, which sections are included, and which fields are included if you include the details section, are determined by settings in the **Maintenance** ⇒ **Receipt Options** [window](#). For mail-merge receipts, you have to edit the receipt template to make relevant changes - see the section on the [Details Table](#) in the Help page on Mail Merge Fields for details.

Some Canadian organizations like to use actual tear-off forms for their receipts. You will want to print a sample receipt on your printer to determine where the perforations should go, before you spend money for such forms. It appears that you cannot just buy such forms at a stationery shop - you have to have them printed by a print shop or press such as Moore Business Forms. Just request plain 8 1/2" x 11" white bond paper, with a fine perforation at the position you have carefully measured. Some users may also prefer to ask for a security background on the top portion above the perforation, as in a cheque. Another option is that they can put very fine markings on the top portions that will show up if the receipt is photocopied.

However, you really may not wish to order such tear-off forms, because we cannot guarantee that future revisions to the receipt formats in DONATION will not affect where the break is between the top part and the bottom part. Such changes would mean you would have to throw out any existing forms and order new ones!

#### Split Receipting: Total vs. Eligible Amounts

Another issue regarding receipts is related to the entry of the Eligible Amount for Donations. The following discussion is primarily about its use in Canada.

An example of when you might enter the Eligible Amount is a fundraising dinner. Suppose the donors buy tickets costing \$100 for a fundraising dinner, and the actual cost of providing the dinner to your organization is \$40. That means that only \$60 of the donor's donation is eligible to be included on a charitable receipt. The way you enter this is to enter \$100 for the Total Amount, and \$60 for the Eligible Amount. The Eligible Amount is what the donor can claim on their taxes. The \$40 (the value of what the donor received) is called the "Advantage".

**Note:** As of late 2006, there were new Canada Revenue Agency (CRA) regulations with regard to this situation, which they call "split receipting". They require the separate display of the following fields on a receipt:

- the total cash amount of the donation received by the charity
- the value of the advantage (what the donor received), and
- the eligible amount of gift for tax purposes.

All receipts for Canada or Quebec show all three of these lines, but only if an Eligible Amount has been entered. If no Eligible Amount has been entered for the donation(s) included in the

receipt, the CRA only requires the last of those three lines above to be on the receipt, so that is what DONATION does.

You can control whether the Eligible Amount field is displayed in the Donations area of the main window with an option on the Donations tab of the **Maintenance ⇒ Main Window Options** [window](#).

**Note for users in the U.S.A. and other countries:** Very few users in the U.S.A. seem to want to do this type of "split receipting" that is used in Canada, so at this point the DONATION program's receipts for the U.S.A. always show just the regular Amount (or Total Amount) field. If you do want to do split receipting, you **can** use the Eligible Amount field, but you will need to use the mail-merge receipts and make some adjustments to your receipt template to show the desired fields. See [Donations and Receipts with Advantage](#) for full details.

Receipts for all other non-Canadian countries use the Eligible Amount, if it is entered, and otherwise use the regular Amount (or Total Amount) field.

Canadian receipts with Advantage also require a description of that Advantage to be printed on the receipts. That can be entered on the Description field, for non-Gift in Kind donations, or the Description of Advantage field for any donations. Please see [Donations and Receipts with Advantage](#) for full details on everything about such donations.

#### Gift in Kind Receipts

If you receive gift in kind (non-"cash") donations, it is very important that you read the topic on [Gifts in Kind](#).

**Important:** For Canadian users, the normal receipts on the **Receipt** menu will exclude any donations whose Cheque # / Paid By value is "Gift in Kind", which is an option on the drop-down list for that field. Receipts for gifts in kind are then instead generated by using the menu options on the **Receipt ⇒ Gift in Kind Receipts** sub-menu, which replicate the options on the main **Receipt** menu. **So you will have to use two menu options if the donor(s) you are creating receipts for have both gift in kind and non-gift in kind donations, to cover all of those donations!**

Like donations with Advantage mentioned above, Canadian receipts for Gifts in Kind have to be one receipt per donation, so each of the menu options for generating such receipts, including **Receipt ⇒ Gift in Kind Receipts ⇒ Current Donor Original**, may generate more than one receipt if there is more than one unreceipted Gift in Kind donation for that donor.

#### Multiple User Issues

For users with multi-user versions of DONATION (the [Local Network](#) Version, or the [OnDemand](#) Version), when one user is creating a receipt, no other user can do so at the same time, to prevent problems with inconsistent or missing receipt numbers. However, as soon as that first user has printed the receipt, saved it to PDF, or emailed it, another user can get in to create other receipts. If the first user does none of those things, other users are still blocked until the first user exits the window where they are viewing the receipt.

#### See Also

[Generating Receipts using Mail Merge](#)  
[Generating Duplicate or Corrected Receipts](#)  
[Reprinting Receipts](#)  
[Statements and Receipts](#)  
[Using a Logo and Signature Bitmap on your Receipts](#)  
[Generating Bilingual Receipts](#)  
[Generating U.S. Receipts](#)  
[Donations and Receipts with Advantage](#)  
[Generating Filtered Receipts](#)  
[Handling Non-Receiptable Donations](#)  
[Deleting Receipts](#)  
[Receipt or Donor Mailing Labels](#)  
[Receipt or Donor Envelopes](#)  
[Emailing Receipts](#)

## 19.2 Generating Duplicate or Corrected Receipts

This section explains how to create, and when to use, duplicate and corrected receipts. (Duplicate receipts are also called "replacement" receipts, particular for Canada.) While the same menu options are used to generate them, they are significantly different in concept. The two menu options that can generate individual duplicate or corrected receipts are **Receipt ⇒ Current Donor Duplicate/Corrected** and **Receipt ⇒ Duplicate/Corrected by Number**. Both options are mostly used when a donor has already received an original receipt, and you need to send them a new one.

One other menu option that is related is the **Receipt ⇒ Reprint Range** [menu option](#). That is for use when there is no correction to be made, or the only corrections are ones you have already made to the donor's information (such as their name or address), rather than to donation information. Reprint Range does also handle some changes to donation information (deleting donations included in the receipt). Reprint Range can be used when the donor(s) have **not** received the original receipt(s), and you just need to reprint them so you can send them to the donor(s) for the first time. But it can also be used to reprint receipts marked as being Duplicate or Replacement or Corrected, if the donor(s) **have** already received the original receipt(s), and you need to mark them that way.

Another related [option](#) is **Receipt ⇒ Delete Range**. If you have printed the receipts, but not sent them to the donors, and you realize that they are all wrong in some way, you can delete them from the database (without deleting the donations that were included in those receipts!) with that menu option. After deleting the receipts, and making whatever corrections are required, you can then re-create them normally, without having to use the instructions in this help topic, for instance by using **Receipt ⇒ All Donors**.

**Note:** If you have moved on to a new year, and need to create a corrected or duplicate receipt for the previous year, you will first have to switch back to that year with the **Maintenance ⇒ Change Year** [menu option](#). When you are done working on your receipts (and anything else you need to do in the previous year), you can go back to the current year with **Maintenance ⇒ Change Year** again. See [Changing Years in the Database](#) if you need more information on this.

A **duplicate** (or replacement) receipt is one where the donation information has not changed, and you just need to reprint a receipt because the donor informs you that they lost the original that you sent to them. It will have "Duplicate Receipt" printed on it, to help make sure that the

donor doesn't use both receipts, if they do find the original. If all you need is a duplicate receipt, you can skip reading the next section on correcting receipts. (However, for users in Canada it is more complex - see [Replacement or Correction Receipts for Canada](#) below for details.)

If you have set a [Receipt Password](#), entering it is required to use any of these menu options for correcting or reprinting receipts. You can do that by entering it when the program starts up (if you have also set a Program Entry password), or when you use these **Receipt** menu options that require it.

#### Gift in Kind Receipts for Canada

Canadian users have distinct receipt formats for regular and [Gift in Kind](#) receipts. Replacements or corrections of regular receipts are done with **Receipt ⇒ Current Donor Duplicate/Corrected** or **Receipt ⇒ Duplicate/Corrected by Number**, while Gift in Kind receipts can be replaced or corrected with **Receipt ⇒ Gift in Kind Receipts ⇒ Current Donor Duplicate/Corrected** or **Receipt ⇒ Gift in Kind Receipts ⇒ Duplicate/Corrected by Number**.

#### Correcting Receipts - Simplest Case

This section covers the case where all that needs to be corrected is one or more of the fields of a donation included in the receipt - usually the donation date, amount(s) or category.

First just [find the donor](#) and the donation included in that receipt on the program's main window. Click on any field in the receipted donation row that you want to correct, so that the hand pointer at the left points at it. Then click the **Correct** button in the row of buttons above the donations, and follow the prompts.

That's all you have to do in that case. For a few more details, see [Editing a Donation](#).

Note: If you change a donation to be [non-receiptable](#), you will be asked to confirm that change, and if you confirm it, the donation will be removed from the receipt.

For Canadian users, you cannot use the **Correct** button's window to change a donation from being for a [Gift in Kind](#) to not being so, or vice versa, or from being for a donation with [Advantage](#) or not being so, because each of those types of receipt are different. (That window will stop you from doing so, if you try!) Use the method in the next section below instead.

#### Correcting Receipts - More Complex Cases

This section covers what to do if there is more wrong with the **donation** information in a receipt, and you need to correct it. Possible problems include:

- A donation needs to be deleted (for instance, because the cheque came back NSF)
- A donation needs to be added, because you missed it originally.
- For Canadian users, you need to switch a donation between being for a Gift in Kind and not, or between a donation with Advantage or not.

Here are the steps you need to use to make such corrections:



1. Be sure to note the receipt number of the receipt you are correcting first, if you do not have a printed copy of it in front of you. It will show in the Recpt # field in the Donation Details area of your main window.
2. If any donation included in the receipt just needs to be deleted (for example because it was NSF), you do so by clicking the mouse into any field on that donation's row (which will move the pointing hand at the left to point to that row), then click the **Delete** button above those rows of donations (to the right of the Batch Entry button). You will have to confirm the delete by pressing **OK** on two successive message boxes.
3. If you then need to re-enter a donation you deleted in step (2) because it needed to be corrected, just enter it normally on the blank donation line on the main window, then click **Save** to save it. You will not be able to enter the Recpt # field - it gets filled in later when you actually create the receipt.
4. If you need to enter any donation that was missed out from the receipt originally, add it as in the previous step.

Now you are ready to actually create the corrected receipt, which will normally have the words "Corrected Receipt" added to it (or more complex wording for Canada).

Note: You cannot correct receipted donations on the Batch Entry window - it will not even retrieve previously entered donations that already have a Recpt #.

#### Creating your Duplicate or Corrected Receipt

For the **Receipt ⇒ Current Donor Duplicate/Corrected** option, you must first click into the row of a donation on the main window that is part of the receipt for which you want to create a duplicate or corrected version (has that receipt number in its Recpt # field). Its receipt number will be used.

Alternatively, you can use the **Receipt ⇒ Duplicate/Corrected by Number** option, in which case you enter the desired receipt number in the options window that comes up.

In either case, the following window then comes up:

**Duplicate/Corrected Receipt**

Please enter the receipt number you want to issue a duplicate (or corrected) receipt for:

2016-

Please select one of the following options:

☐ Only include donations that are currently included in this receipt

☐ Also include any unreceipted donations for the same donor

**Only check the following if the original receipt has NOT already been sent to the donor!**

☐ Do not change the receipt status to Replacement or Corrected



If you used **Receipt ⇒ Current Donor Duplicate/Corrected**, the receipt number to the right of the year will already be filled in, with the receipt number of the donation you clicked on, and it will not be editable. Otherwise, you fill that number in yourself.

This window normally has two radio button options, of which you must select one:

- **Only include donations that are currently included in this receipt.** You would use this option if you were creating a duplicate receipt, or for instance if you just had to delete one of the donations in a receipt because it was paid by a cheque that came back NSF, and you need to create a corrected receipt with that donation omitted.
- **Also include any unreceipted donations for the same donor.** You would use this if you added any donations that should be included, either as corrections or simple additions. You could also use this option if you wanted to merge later donations (or missed donations) into a receipt issued earlier, but we would advise caution in using it this way, because it could cause confusion for the donor, if they had already received the original receipt. (Instead, you could just issue a new receipt containing only the added donation or donations.)

However, if the receipt being corrected is already known to be a [Gift in Kind](#), because you used **Receipt ⇒ Gift in Kind Receipts ⇒ Current Donor Duplicate/Corrected**, the radio buttons in described above are actually omitted from this window. You cannot add further donations to a receipt for a Gift in Kind, because each such donation has to have its own receipt, to be able to show the description of the gift.

When you use **Receipt ⇒ Duplicate/Corrected by Number** or **Receipt ⇒ Gift in Kind Receipts ⇒ Duplicate/Corrected by Number**, if the receipt number you enter is either a Gift in Kind or a receipt with [Advantage](#), you are only allowed to select "Only include donations that are currently included in this receipt", again because such receipts must be for only one donation.

Finally, there is the **Do not change the receipt status to Duplicate or Corrected** checkbox. As the text above it in the window says, you should only check this checkbox if the original receipt has **not** been sent to the donor. (If they have already received the original receipt, to avoid confusion and/or double submission of receipts on the donor's tax form, this new receipt **must** be marked Duplicate or Corrected, as appropriate.) If you do check this checkbox, you are also asked a further question to confirm that you haven't sent the original receipt to the donor, when you click **OK**.

**Note:** even if you check "Do not change the receipt status to Duplicate or Corrected", if the program notices that either new donations have been added to the receipt (because you checked "Also include any unreceipted donations for the same donor"), or the total amount has changed for any other reason, the receipt will still have its amounts corrected, but it will **not** be changed to say that it is Corrected.

Click **OK** to display the duplicate or corrected receipt, and then you can use the **Print** or **Email/Print** button to print it or email it to the donor.

The following sections give some further details on duplicate and correct receipts.

#### Duplicate Receipts

A duplicate receipt (also called replacement receipt) is if the donor has merely lost the receipt, and there is nothing wrong with it. You should not just send them a photocopy of their original

receipt, because an unscrupulous donor could submit both to the government. Instead, use the above options to generate a duplicate receipt. It will have the words "Duplicate Receipt" added to it (or more complex wording for Canada). For non-Canadian receipts, the duplicate will have the same receipt number as the original. See [Replacement or Correction Receipts for Canada](#) below for details of what happens for Canada.

However, if the donor definitely never received the original receipt (for example if you didn't send it), you can avoid the replacement being marked as a duplicate by either checking **Do not change the receipt status to Duplicate or Corrected**, or instead using the **Receipt ⇒ Reprint Range** [menu option](#), which normally does not change the status of the receipt to Duplicate if it is not already marked as a Duplicate, and the amounts have not changed. Of course, if you have a printed copy of the original, you could just send them a photocopy!

### Corrected Receipts

One unusual situation is if only one donation was included in the receipt, the cheque came back NSF, and you can't get the donor to replace the cheque. In that case, you must use the **Receipt ⇒ Duplicate/Corrected by Number** option to create the receipt (because there is no remaining donation to click on!). The corrected receipt will show the amount of \$0. Make sure that if the donor received the original receipt, they also get this corrected receipt, even if it is for \$0, so that they know not to use the original.

When you do delete a donation for which a receipt has already been issued, there is actually inconsistent data in the database until you issue the corrected receipt. If you generate **Reports ⇒ Receipt ⇒ All Receipts**, it will still show the original incorrect amount for this receipt. As soon as you issue the corrected receipt, this is fixed. There is also a report for finding such problems, where the total of donations currently associated with a given receipt does not match the original total for the receipt. That report is **Reports ⇒ Receipt ⇒ Incorrect Receipts**.

We should also note here that the option **Receipt ⇒ Reprint Range** does not normally create duplicate or corrected receipts (unless the ones being reprinted are already marked as being duplicates or corrected, or you choose the options to mark the reprinted receipts as "Corrected" or "Duplicate"). It can be used to reprint original receipts, and should be used when the original print did not work, as for instance when there was a paper jam or your printer ran out of ink. However, if a donation included in a receipt has been deleted, and thus it needs to be corrected, the **Reprint Range** menu option is smart enough to correct the receipt for you and mark it as a "Corrected Receipt". Reprinted receipts (rather than duplicate/corrected) can also be used when a receipt has been previously generated, but never sent to the donor.

### Replacement or Correction Receipts for Canada

The Canada Revenue Agency (CRA) wants replacement receipts (whether they are a correction or not) to have a new receipt number, with a reference back to the old receipt number that they are replacing. The old receipt is to be retained, and marked "Cancelled".

To accommodate this, starting in version 3.64 of DONATION, any action that creates a replacement or corrected receipt, including **Receipt ⇒ Current Donor Duplicate/Corrected**, **Receipt ⇒ Duplicate/Corrected by Number**, and **Receipt ⇒ Reprint Range**, depending on the options chosen on the windows for those menu options, will do this. A new receipt will be created, and all donations included in that receipt will be

moved from the old receipt number to the new receipt number. The old receipt will still exist, but will now have no attached donations, a total amount of \$0, and a type indicating that it is cancelled.

Of course, a new receipt number is **not** created if you check "Do not change the receipt status to Duplicate or Corrected", because that assumes the original receipt was never sent to the donor, and thus no real correction or replacement is happening.

The receipt type printed on built-in receipts (or the «ReceiptType» mail-merge field for mail-merge receipts) now has much longer text than it does for non-Canadian receipts (which say either nothing for original receipts, or "DUPLICATE RECEIPT" or "CORRECTED RECEIPTS"). Examples of what this text can say include "This receipt is CANCELLED - it has been replaced by No. YYYY-NNNNN" for a receipt that has been replaced, and "This receipt cancels and replaces the original No. YYYY-NNNNN" for its replacement. (Similar wording is used for corrected and correction receipts, with additional wording about it being corrected as well as replaced.) Of course, receipts for Quebec will use appropriate corresponding French or bilingual wording.

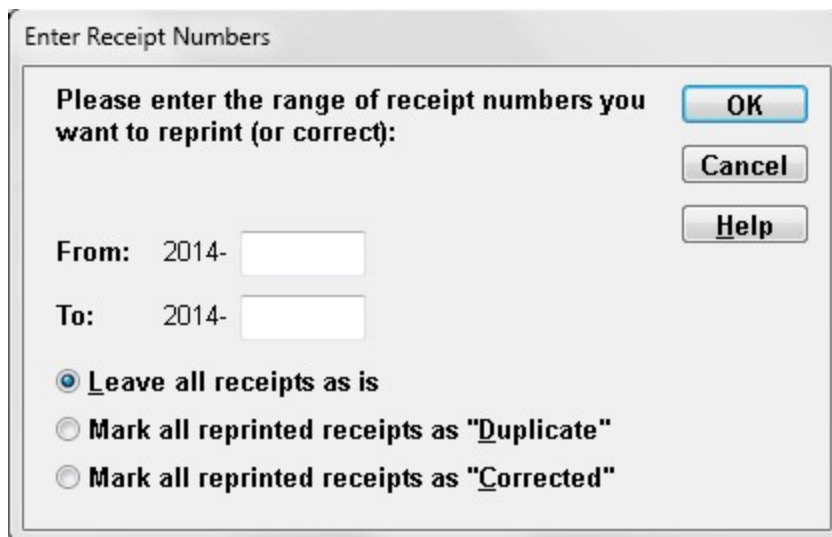
The original receipt, now marked cancelled, should be printed out and kept with your records, replacing the original one you had on file. The new receipt should be sent to the donor. When you are [emailing receipts](#), replaced or corrected receipts (the old ones, marked "Cancelled") will never be emailed, but always printed for your records.

Any duplicate or corrected receipts created with versions of DONATION prior to 3.64 will still show the old wording, that is also used on non-Canadian receipts.

When an individual receipt is being corrected or replaced, and the new and old receipts are displayed, the new one will appear first, to avoid confusion. (Prior to version 3.70, the old one, with the total amount of \$0, appeared first, which led many users to think something was wrong, if they didn't notice the other receipt lower down!)

## 19.3 Reprinting Receipts

If you have a problem printing a batch of receipts, and you have already exited the window displaying them, or you need copies of previously printed receipts for any other reason, you can reprint them with the **Receipt = Reprint Range** menu option. That brings up the following window:



This option prompts you for the starting and ending receipt numbers that you want to reprint, and then recreates them and gives you an option to print them again. (Being able to specify the receipt numbers is very helpful if some of your receipts printed before, but others didn't.) If you aren't sure which receipts you want to reprint, you can view a report on all generated receipts this year with **Reports** ⇒ **Receipt** ⇒ **All Receipts**.

The **Reprint Range** menu option can also be used to reprint just a single receipt, that you need for some reason.

The radio button for **Leave all receipts as is** should only be used if you have **not** already sent the original receipts to the donors.

The radio buttons for **Mark all reprinted receipts as "Duplicate"** (which may instead say "Replacement") or **Mark all reprinted receipts as "Corrected"** should always be used if you have already sent the original receipts to the donors. In that case, if you need to resend all of them for some reason, they need to be marked either "Duplicate" (or "Replacement") or "Corrected". That way the donors know they are replacing the original version. This will handle corrections to things like the receipt format, or donors' addresses. This menu option will also always correct totals if a donation that was previously included in a receipt has been deleted. If newly added donations need to be included in the receipts, however, please read and use the Help on [Generating Duplicate or Corrected Receipts](#) for options to do this one receipt at a time.

Please also see [Replacement or Correction Receipts for Canada](#) for more details of exactly what this does for Canada. (It creates a new receipt with a new number, and a reference back to the old receipt number it is replacing, whenever the new receipt is a replacement or correction.)

If you have set a [Receipt Password](#), entering it is required to use this window. You can do that by entering it when the program starts up (if you have also set a Program Entry password), or when you do the menu option that requires it.

[Gift in Kind Receipts and Receipts with Advantage for Canada](#)

Canadian users have distinct receipt formats for regular and [Gift in Kind](#) receipts. Regular receipts can be reprinted with **Receipt ⇒ Reprint Range**, while Gift in Kind receipts can be reprinted with **Receipt ⇒ Gift in Kind ⇒ Reprint Range**.

If you enter numbers of receipts in the range of one of those two menu options that are of the wrong type (for instance, Gift in Kind receipt numbers when you use **Receipt ⇒ Reprint Range**) you will receive a warning message explaining what will happen. Specifically, if the entire selected range was receipts of the wrong type for your selected menu option, it won't reprint anything, and if only some of them were of the wrong type, it will only reprint the ones of the right type.

As with **Receipt ⇒ All Donors**, if you have cash or Gift in Kind donations with advantage ([split receipting](#)), and also ones without advantage, you will have to run the appropriate **Reprint Range** menu option twice to reprint the receipts for donations with and without advantage.

## 19.4 Statements and Receipts

The DONATION programs uses the word "receipt" for the official documents you send to the donors for their tax deductions. In the U.S.A., what the program calls "receipts" are also frequently called "contribution statements". We reserve the word "statement" for a report or letter that is **not** meant to be used for tax purposes, only for the donors' information.

Some users want to be able to let their donors know how much they have given at various points during the year (for example quarterly) and also want to let them know their totals at the end of the year.

You can't do this by using only the official receipts generated by the **Receipt** menu options, which are used for your donor's tax deductions, because once a donation has been included in one receipt, it will not appear on any future receipts generated for the same donor. If that restriction was not in place, you could be double reporting the same donations, and users would be claiming too large a deduction on their taxes!

### How to Create Statements

The solution to this is to use one of the following options as non-tax-receipt statements to show your donors how much they have given:

1. Use the **Letters ⇒ Mass Mailing [menu option](#)**, selecting the "Total Donations Information" option in Section 1. That allows you to specify a range of dates (for example one quarter of the year), and to include a detailed donations section and/or a category totals section, and also allows you to add your own wording. To do this for just one donor, do the same thing with the **Letters ⇒ One Letter [menu option](#)**.
2. Send individual thank-you letters for each donation, selecting the "Individual Donation Information" option in Section 1 of the **Letters ⇒ Mass Mailing [menu option](#)**, or if you are doing them one donor at a time, the "Current Donation Information" option in Section 1 of **Letters ⇒ One Letter**.
3. Use either **Reports ⇒ Donation ⇒ Details, One Page per Donor** or **Reports ⇒ Donation ⇒ Category Totals, One Page per Donor**. These reports can also be selected for a range

of dates. However, unlike the letters you cannot add any wording to them. To do this for just one donor, after generating the desired report, use a [Filter](#) to restrict it to that donor.

If you are trying to send statements to your donors who have made [pledges](#), with pledge information included, select the "Pledge Information" option in Section 1 of **Letters** ⇒ **Mass Mailing**. That reports on donors' pledges, and what they have paid on those pledges. However, unless you are only recording donations against pledges in DONATION, and never recording any unpledged donations, these letters cannot be viewed as a complete statement to the donors.

#### How to Use both Statements and Receipts at Different Times of the Year

There are actually two possible approaches to using these reports or mail merges in conjunction with official receipts:

1. Send out the statements letters or reports to your donors periodically during the year, and only generate and send out receipts using the **Receipt** menu options at year-end, which will thus include all of the year's donations.
2. Generate and send out official receipts to your donors periodically during the year, and along with a final receipt for the last part of the year, also generate a statement letter or report for the entire year to send out with it.

It is entirely up to you which of these options you wish to use, though most users seem to prefer the first option, as having only one official receipt simplifies things for the donors. And of course, many users do not feel a need to send periodic statements at all, and just stick with either year-end receipts, or receipts for individual donations sent out soon after the donations are received.

#### Other Helpful Information

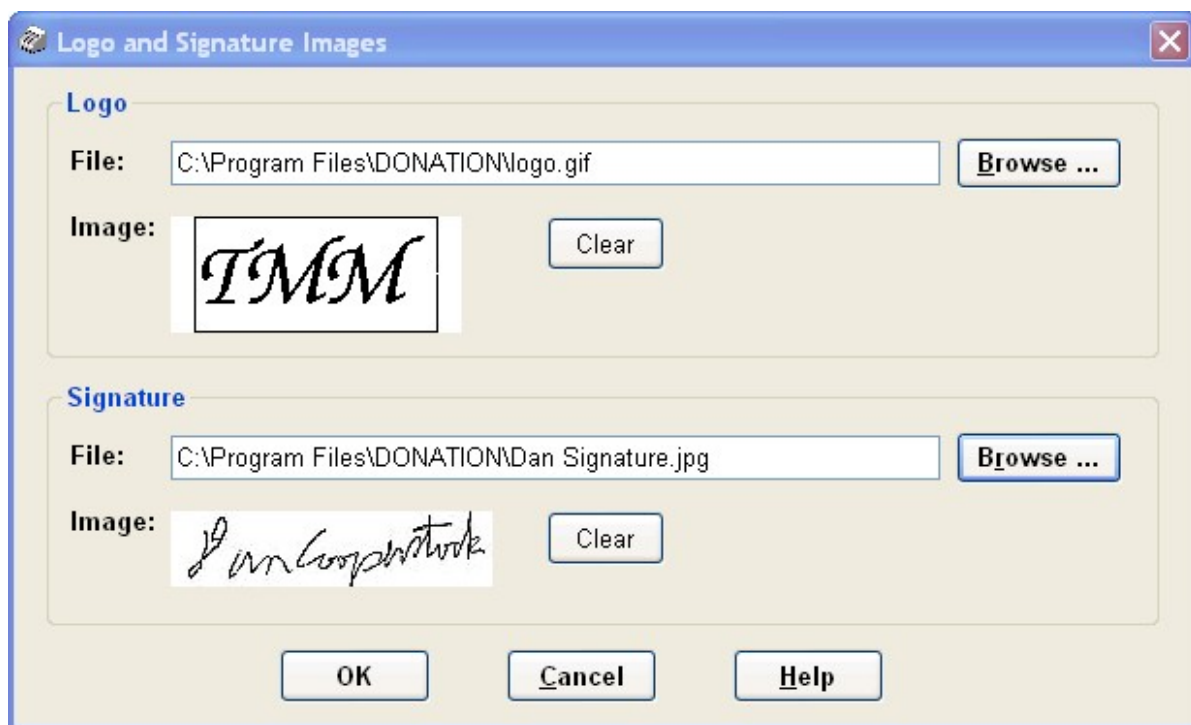
All statement reports and mail merges, and both the built-in and [mail-merge version of the receipts](#), can be sent by email to donors with email addresses. See [Emailing Receipts and Statements](#) for details.

All statement reports and mail merges also include the donor's Title, if you have entered it and you have checked the "Include Title in Names in Letters and Receipts" checkbox in the **Maintenance** ⇒ **Main Window Options** [window](#). Middle Initials are not included in any statement reports, and are only included in mail merge letters used for statements if you edit their templates and explicitly replace the merge field «Name» with the merge field «NameWithMiddle».

## 19.5 Using a Logo or Signature bitmap on your Receipts

You can specify graphics files for both your organization's logo, if you have one, and the receipt signing officer's signature, via the **Select Logo and Signature** button in the window that comes up when you select the **Maintenance** ⇒ **Receipt Options** [menu option](#). That brings up the following window (with some sample data shown):





The two fields after the **File** prompts are not editable: you select the files using the **Browse** buttons. You may select files from any folder on your local hard drive, and they may be in any standard bitmap format (BMP, GIF, JPG or PNG). Once you select a file with the **Browse** button, the program will check that it has the correct dimensions (details below) and then display it in the corresponding **Image** area.

If you decide that you don't want to have one of the Logo or Signature bitmaps used, which you have previously specified, use the **Clear** button to remove it.

As usual, you can save your changes on this window with the **OK** button, or abandon your changes with the **Cancel** button.

### **Using your Logo in the Receipts**

If you have an organizational logo, and specify it in the window above, it will automatically display on the program's built-in receipts, in the top right corner. (If you choose to [generate receipts with Mail Merge](#), it will also display on them.) If you don't specify it in that window, your logo will not appear on the receipts, but they will still print fine.

The logo should be in a bitmap file as described above. Usually your organization will already have it in a separate file, at a standard desired size.

There are actually two cases, that determine the requirements for the dimensions of the logo file you will use:

1. **You are using built-in receipts, and/or printing receipt or donor [envelopes](#) and choosing the option when you do so to display the logo on the envelopes.** In this case, the logo's dimensions must be width 150 pixels by height 60 pixels, or any exact multiple of those dimensions. When you use one that is a multiple of those dimensions, it



will be scaled to fit into the desired size of 150 x 60 when it is displayed on built-in receipts or envelopes.

2. **Your only use of the logo will be on mail-merge receipts and letters.** In this case, you can use any reasonable size that fits on the page (usually in the top-right corner of the receipts and letters), and the logo will be specified at the size you choose.

If you do select a logo image that is not an exact multiple of 150 x 60 pixels, you will be offered options of what to do about it, which will vary depending on whether or not you have already selected to use mail merge receipts. One of the options will be to let the program automatically fit your logo into a multiple of that desired size for use in built-in receipts and logos printed on envelopes. If you choose that option, the program will do that for you automatically, by finding the next multiple of that desired size that your selected logo will fit within, and putting it into a blank image of that size, at the bottom right corner.

Alternatively, if you are familiar with graphics editing programs such as Microsoft Paint, Photoshop or Paintshop Pro you can do such fitting into the desired dimensions (any exact multiple of 150 x 60) yourself, and then select your edited file here. However, there is no clear advantage to that over letting the program do it for you.

The same logo file is automatically included in the template [mail merge receipts](#) and mail merge letters provided with the program. However, it is not scaled to any given size - it will show up at whatever size the file actually is. So as mentioned above, if you use the mail merge receipts instead of the built-in versions, your logo doesn't actually have to be a multiple of 150 x 60 pixels in size. And if it **is** a multiple of that size, it will still be displayed at the full size you saved it as, not scaled down to 150 x 60. You can also alternatively [edit](#) the sample mail merge receipt, to remove that logo file and insert a different one (of any size and shape) in its place, or in a different position in the receipt.

Unless you are printing on a colour printer, this will probably look best if your bitmap is all black-and-white, or what most paint programs call two-colour or monochrome.

The same logo file can also optionally be included on [envelopes](#) that you print for donors or receipts, and it will always be scaled to 150 x 60 pixels there.

### **Using a Bitmap Signature on the Receipts**

You can also use a bitmap for the signing officer's signature. It should be a bitmap file 166 x 39 pixels, or an exact multiple of that size, for example 332 x 78, 498 x 117 or 664 x 156. If such a file is specified in the window above, it will automatically be used on the built-in receipts, scaled to 166 x 39 pixels. If not, the space will be blank for a hand-written signature as usual.

The same bitmap signature file is also included in the sample [mail merge receipts](#), and is also automatically scaled to 166 x 39 pixels.

To get such a file, normally the best option is to write a clear signature in black ink on a plain white piece of paper, near the top-left corner (but not right in the corner). Don't make it too large. Then scan that to an image file (GIF, JPG, BMP or PNG - but not PDF!) on your computer with a multi-function printer's scanning feature, or dedicated scanner. You will get the best results if you instruct your scanning software to scan at 300dpi (possibly also called

"photo quality") or even better 600dpi, and also tell it to scan in grey scale (rather than either colour or black and white).

You can try using a digital photo of a signature, but you will have to make sure that the light is very good or you are likely to end up with a grey background when you use it! If you do use a photo, don't take it from too close up. Your results are likely to be much better if you can scan your signature rather than using a photo!

When you then select that scanned file or photo with the **Browse** button in the lower section of the window above, for signatures, you will receive a messagebox if the file you select is not already an exact multiple of 166 x 39 pixels (which it is very unlikely!). That messagebox will give you an option to "Edit Signature Image to Fit Standard Dimension". Choose that option, and follow the written directions on the window that comes up to click into it to draw an appropriate selection rectangle entirely surrounding your signature, and click **Snip** in it to save your selection as the desired signature. One thing that window does automatically is change the scanned image or photo to entirely black and white (not even any grey), which will help to avoid a light but non-white background around your signature, which can otherwise happen even with a good scan!

If this doesn't give good enough results (when you look at it on a printed sample receipt, or a sample receipt saved to PDF) you can try again with a new scan of a new signature made with darker and/or heavier ink. Also, perhaps if your first signature was quite large, try using a smaller signature, which may give better results. And as mentioned above, 300dpi or 600dpi, scanned as grey scale, will in our experience give the best results.

Some users may wish to use a password to govern the generation of receipts, since having the bitmap signature there makes it more of a one-person job that is less desirable from an audit perspective. To set up such a password, use **Maintenance ⇒ Change Password ⇒ Receipt Password**.

The name of the signing officer is also printed on the receipts - it is entered or updated in the **Maintenance ⇒ Organization Info** [window](#).

### **Different Files for Different Databases**

If you create and switch between multiple database for multiple organizations with the **Database ⇒ Switch Databases** [menu option](#), each one needs to have its own logo and signature files specified. Just go into the Logo and Signature Images window once for each of your databases, and choose the desired files for each one. They will then be automatically used, as you switch databases.

(Previous versions of DONATION always used the file C:\Program Files\Donation\logo.bmp for the logo, and C:\Program Files\Donation\signatur.bmp for the signature, for all databases, which was much more limiting. When you first upgrade from previous versions of DONATION to version 3.30 or higher, if those files are present, they will be picked up and displayed in the window above, and used on your receipts, but you can then change them if desired.)

### **Moving the Program to Another Computer**

When you [move the program](#) to another computer, or just [transfer your database](#) to another computer via backup and restore, any logo and signature images you have specified come with the database, so you don't have to do anything special. (The actual files are not

transferred, but their contents have been loaded into the database, so you don't have to transfer the files - they will just work.)

### **Using the Local Network or OnDemand Versions of DONATION**

If you are using the [Local Network Version](#) or [OnDemand Version](#), you can set the logo or signature images on any of the computers running it, and then next time you start DONATION on any of the other computers, they will pick up the change.

### **Notes on using Bitmap Signatures for Canadian Users**

The Canada Revenue Agency, on a web page about [Computer-generated Receipts](#), has some regulations about doing this, which DONATION seems to satisfy. However, you may wish to review that page yourself to convince yourself that it is OK.

### **Inserting Logos and Signatures in other Mail Merge Files**

If you are [editing mail merge](#) files other than the receipts, which automatically include any logo or signature image you specify in this window, you can insert those images with the editor's **Insert ⇒ Logo Image** or **Insert ⇒ Signature Image** menu options. You can also re-insert them on the mail-merge receipts with those menu options, with an option to scale or not scale them to the standard sizes (if they are a different size), after first deleting them there.

### **Training Video**

There is a training video on Using a Logo and Signature bitmap on your Receipts on the [Demos and Samples](#) web page, if you would prefer to see this feature demonstrated live, rather than just reading about it. This might be particularly helpful if you have no idea how to go about creating graphics files with the correct dimensions, because it gives a quick introduction to doing that using the Windows Paint program.

### **Help with Editing your Logo and Signature Files**

In the vast majority of cases, the built-in editing features in the program for sizing logos and snipping signatures out of scans should mean that even users with no knowledge of graphics editing can follow the above instructions without additional assistance.

Virtually the only case we can imagine where you might need to use a graphics program is if you are using mail-merge receipts, and your organization's logo image is just too big to fit reasonably on the receipts. In that case you could load it into a simple graphics program such as Microsoft Paint, Photoshop or Paintshop Pro and use that program's features to resize (or scale) the image to be a reasonable smaller size. If you do that, be careful to use that program's options to "maintain the aspect ratio", which means to leave the ratio of the height to the width unchanged.

**Note:** We're sorry, but if you need further assistance with manual graphics editing of your files using a graphics program, beyond what the program can do for you, that would **not** be something that is included in our usual technical support that you pay for with your Annual Fee or that is free for legacy [Lite](#) version users.

## 19.6 Generating Bilingual Receipts

If your organization is in Quebec, or has a national donor base within Canada, you will need to generate either French/English bilingual or French-only receipts. To do that, go to the **Maintenance** ⇒ **Receipt Options** [window](#), and check one of the "Quebec" radio buttons before generating any receipts. (One is for bilingual, the other for French-only.)

In that same window, you can check the **Use French Dates** checkbox, in the "Options for Canada Only" section, to force the dates displayed in both the built-in receipts and in all mail-merge letters and receipts to be in French. If you select "Quebec (French only)", you **must** check that checkbox. The French dates on the receipt use the standard 3 to 5-character month names or abbreviations, for instance "31 juill. 2015" for what we would show in English usually as "Jul 31, 2015".

When you select either Quebec option, the main portion of the receipt, which you submit with your tax form, will be bilingual or French-only. In addition, there will be two copies of the main receipt, one for the federal and one for the provincial tax return. As usual, that is followed by a section for the donor to keep.

Please note, however, that the rest of the program is not at all bilingual.

### Why Are My Receipts Each Two Pages Long?

One disadvantage of the bilingual and French-only receipts is that because of the extra space taken by the 2nd copy of the receipt for the provincial tax form, and for the bilingual version because of having both French and English, receipts tend to go onto a 2nd page. There is not usually any way to avoid this, because of all of the text that the CRA requires on receipts, including leaving some space for extra text needed on [replacement or correction receipts](#), space for both a French and English organization name (entered on the [Organization Info](#) window), three lines for the amounts when [split receipting](#) (what the CRA calls donations with an "advantage") is being used. space for an optional [logo and signature image](#), etc.

If you want to try making the receipts shorter, and you are using the regular built-in receipts, you can try adjusting the options on the **Maintenance** ⇒ **Receipt Options** [window](#). If you switch to the [mail-merge version](#) of the receipts by using the option on that window, you can try editing the template to make it shorter, but honestly there's not much you can remove given the CRA's requirements. The chances are that you are going to be stuck with it being two pages no matter what you try. Sorry!

## 19.7 Generating U.S. Receipts

Users in the U.S.A. should be sure to go to the **Maintenance** ⇒ **Receipt Options** [window](#), and select the "U.S.A." option under Receipt Style / Location to get the right receipt style. Unlike the Canadian style, there is no tear-off section to separate the part that the donor sends in with their taxes, and the part that they keep, because the receipt does not have to be sent in with your taxes in the U.S.

The following sentence is also added to U.S. receipts: "Pursuant to Internal Revenue Code requirements for substantiation of charitable contributions, no goods or services were provided in return for the Tax Deductible contributions". Note that this implies that if donors give amounts that are entirely for goods or services, they either should not be entered into

DONATION at all, or must be marked as Non-Receiptable, via one of the options explained in [Non-Receiptable Donors and Donations](#). However, if you have donations that include a pure donation component, and another component that is for goods or services, they really cannot be handled completely automatically by DONATION at the moment. If this is a problem for you, please [contact us](#) and we can discuss what improvements would be required for the program to handle this. (You can probably create a [mail-merge receipt](#) and hand-edit it to get what you need, however.)

#### Intangible Religious Benefits and Churches

Organizations in the U.S.A. also need to specify whether their donors receive "intangible religious benefits" in the [Options for U.S. Users](#) section of the **Maintenance ⇒ Receipt Options** window. Please read that section to understand this. Your choice about that will change the sentence added to the receipts, that is mentioned in the previous paragraph.

#### Including your Tax ID / EIN on the Receipts

You can optionally have your organization's Tax ID / EIN printed on your receipts. The IRS does not require you to put this number on charitable receipts. Many users do not feel that this is required, and some feel that it is a bad idea, because fake charities could steal and use this number. However, many users do wish to have this number printed on their receipts. To control whether or not the Tax ID / EIN is printed on the receipts, only fill in the Charitable # or Tax ID / EIN field on the **Maintenance ⇒ Organization Info** [window](#) if you do wish it to be printed on your receipts.

## 19.8 Donations and Receipts with Advantage

This section is primarily for users in Canada. While the data entry fields mentioned below are available for users in other countries, the built-in receipts will only use those fields if you choose a Receipt Style / Location for Canada in the **Maintenance ⇒ Receipt Options** [window](#) - one of "Canada (English only)", "Quebec (French only)" or "Quebec (bilingual French & English)".

The Canada Revenue Agency (CRA) requires special elements to be added to a receipt when the donor receives goods or services in return for their gift. (Note: this has nothing to do with [Gifts in Kind](#), which are donations of goods rather than money.) The Canada Revenue Agency calls the value of the goods or services that the donor receives an "advantage". This is also called "split receipting".

When there is an advantage, three dollar amounts must be displayed on the receipt:

- the total cash amount of the donation received by the charity
- the value of the advantage (what the donor received), and
- the eligible amount of gift for tax purposes.

The 1st of those amounts is entered in the donation's Total Amount field, and the 3rd is entered in the Eligible Amount field. The value of the advantage (the 2nd line) is the difference between those two amounts.

Both regular monetary donations (which the CRA calls "cash donations") and Gifts in Kind can have an advantage.

An example of a cash donation with advantage is a fundraising dinner. Suppose the donors buy tickets costing \$100 for the dinner, and the fair market value of the dinner that the donors will receive is \$40. That means that only \$60 of the donor's donation is eligible to be included on a charitable receipt. The way you enter this is to enter \$100 for the Amount, and \$60 for the Eligible Amount. The Eligible Amount is what the donor can claim on their taxes.

For a Gift in Kind, an example is a donation of a painting for which the fair market value is \$500, but the charity gives the donor \$100 for it. Then the Advantage is \$100, and the Eligible Amount is \$400.

Receipts for donations with advantage also have to have a description of the advantage (whatever was received by the donor) printed on them. Although this has apparently been the rule for a long time, for some reason we were not aware of it until Fall 2017, when one user brought it to our attention. Our apologies for that oversight! Many changes were made as of version 4.01 of DONATION to allow for displaying the description of the advantage on the receipts.

### **CRA Rules**

It is your responsibility to understand and follow the CRA's rules for what is counted as an advantage - the program does not enforce them. Currently (late 2017) one CRA web page describing those rules is:

<https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/issuing-receipts/split-receipting.html>

Currently one of the rules is that if the Advantage is more than 80% of the Total Amount of the gift, you cannot receipt for the remaining Eligible Amount. So in those cases it would be your responsibility to set that donation to be non-receiptable. The program will give Canadian users a warning if they enter a donation where the Advantage is more than 80% of the Total Amount, if the donation is receiptable. See [Non-Receiptable Donors and Donations](#) for details on how to make the donation non-receiptable.

The rules are actually a bit more complex than this, because there is also what is called the *de minimis* rule. It is your responsibility to understand and follow the CRA's rules!

### **U.S.A. and Other Countries**

Very few users in the U.S.A. seem to want to do this type of "split receipting" that is used in Canada, so at this point the DONATION program's receipts for the U.S.A. always show just the regular Amount (or Total Amount) field. If you do want to do split receipting, you **can** use the Eligible Amount field, as described in the section on Data Entry below, but you will need to first, switch to the [mail-merge receipts](#), and then make the following adjustments to your receipt template.

In place of the section where it says:

**Thank you for your contribution of:** «ReceiptAmount»

Instead copy and paste in the following lines (with whatever exact wording you prefer, but the fields in the double angle brackets must be exactly as shown here):



«if:AdvantageAmount»Total amount of cash received: «ReceiptAmount»«endif»

«if:AdvantageAmount»Value of advantage:«AdvantageAmount»«endif»

**Eligible amount of gift for tax purposes:** «EligibleAmount»

Receipts for all other non-Canadian countries use the Eligible Amount, if it is entered, and otherwise use the regular Amount (or Total Amount) field. They can also be switched as described above to show all three amounts on mail-merge receipts.

### **Data Entry**

There are three optional fields that can be relevant when entering Canadian donations with advantage: Eligible Amount, Description, and Description of Advantage. Whether or not those fields are visible when entering donations on the program's main window is determined by checkboxes on the [Donations](#) tab of the **Maintenance ⇒ Main Window Options** window.

The Total Amount field (which is just called Amount if you are **not** displaying the Eligible Amount field) should have the total amount given by the donor entered in it.

The Eligible Amount should have the eligible amount of the donations for tax purposes entered in it - which is the Total Amount minus the value of the Advantage.

The description of the advantage can go into either the Description field, or the Description of Advantage field, except in the case where the donation is also a Gift in Kind. In that case, the description of the Gift in Kind has to go into the Description field, while the description of the advantage goes into the Description of Advantage field. The reason for this option for non-Gift in Kind donations is that if you don't actually receive Gifts in Kind, you don't have to display the Description of Advantage field with the donation fields - you can just use the normal Description field. However, if you do display and fill in the Description of Advantage field for a given donation, it will always be used on the resulting receipt.

The Eligible Amount and the Advantage Description can be only entered when you do your entry of donations on the main window, not via [Batch Entry](#).

### **Receipting**

When Canadian users create receipts using any of the **Receipt** menu options, including the **Receipt ⇒ Gift in Kind Receipts** sub-menu options, special handling is applied if there are donations with advantage included among the donations to be receipted.

The reason for this is that since the description of the advantage has to be printed on receipts for such donations, each donation with advantage has to have a separate receipt generated for it - just like with receipts for Gifts in Kind. It's only when there are donations without advantage, that are not Gifts in Kind, that multiple donations from the same donor can be included on a single receipt.

Also, because of this difference, different internal reports or mail-merge templates are used by the program for generating the receipts with and without advantage. As a result, a batch of receipts (such as one generated by **Receipt ⇒ All Donors**) cannot include both donations with advantage and donations without advantage.



To make this happen, when you choose a receipt menu option to generate receipts, the program first examines all of the donations for all donors that would be included in such receipts, and follows these rules:

- If none of them have advantage, normal receipts are generated. Normally such receipts will not include all three dollar amounts mentioned above, but rather only the eligible amount of the gift (which you entered as the Amount or Total Amount.)
- If all of them have advantage, the special receipts with advantage are generated (one receipt per donation).
- If some have advantage and some don't, you are asked which type of receipts you would like to generate at this time - the ones with or without advantage. After generating that type, you need to come back to the same menu option again, to generate receipts for the ones you skipped. (That would be the donations without advantage, if the first time you did the ones with advantage, or vice versa.)

### **DetailsTable in Mail-Merge Receipts**

If you are using the [mail-merge receipts](#), and including the «DetailsTable:...» field, you may also want to show the Advantage Amount and/or Eligible Amount in that table of details. To do that, find that field in your mail-merge receipt template, delete it, then re-insert a DetailsTable field using the drop-down list of fields above the editing area. That will bring up a window from which you can select the fields to be included in that table, including those extra amount fields. (See more details [here](#).)

### **Other Changes to the Program for Donations with Advantage**

The following other changes were also made when adding in the printing of the description of the advantage as part of version 4.01 of DONATION:

- Added new checkboxes in **Maintenance** ⇒ **Receipt Options**, **Letters** ⇒ **One Letter** and **Letters** ⇒ **Mass Mailing** to allow you to edit and/or merge with the special templates for receipts for donations with advantage.
- In mail-merge letters for individual donations, or for receipts with advantage (including Gift in Kind ones) include a new merge field «AdvantageDescription».
- The **Reports** ⇒ **Custom Reports** [window](#) now includes the Description of Advantage in the fields that can be selected for Donations, as long as you are displaying that field.
- For Canadian users, added a new Notes column to **Reports** ⇒ **Donation** ⇒ **Unreceipted**, which can show "Missing Description" for donations where a description is needed to be printed on the receipt, but has not been entered. This applies to both [Gifts in Kind](#) and donations with Advantage.

## **19.9 Generating Filtered Receipts**

If you have set a [Receipt Password](#), entering it is required to use this option. You can do that by entering it when the program starts up (if you have also set a Program Entry password), or when you do this menu option that requires it.

You can print a selected subgroup of all outstanding receipts (and/or all outstanding receiptable donations) with the **Receipt** ⇒ **Filtered Donors** option. This brings up the **Selection Criteria for Receipts** window, as follows:

Selection Criteria for Receipts

Please enter one or more criteria. Receipts will be generated only for donors and donations matching the criteria.

**Criteria Based on the Donor**

Category 1:

Category 2:

Fax Number:

Other Info 2:

Other Info 3:

**Criteria Based on the Donation**

Minimum Amount:

Minimum Type:

Category:

**Dates Received:**

From:

To:

OK Cancel Help

That allows you to specify criteria based on the Donor (a value of Category 1, and/or a value of Category 2, and/or some text found in any of Other Info 1 through 6) and/or criteria based on individual Donations (a minimum donation Amount, and/or a donation Category, and/or a range of the donations' Dates Received). All donors and donations matching all of the entered criteria, which haven't yet been included on a receipt, and which are otherwise receiptable, will have the receipts generated for them. (To see how to donors or donations are determined to be Non-Receiptable, please see [Non-Receiptable Donors and Donations](#).) Like **Receipt ⇒ All Donors**, this will print at most 500 receipts at a time.

Note that on this window, only the Other Info fields that you have specified should be shown, by checking their checkboxes on the Donor tab of the **Maintenance ⇒ Main Window Options** window, will be displayed for use in filtering here. Also, if you have assigned names to those Other Info fields on that same window, they will appear here as well. In the example above, the user has chosen to have only the default Other Info1 through 3 fields displayed on the main window, and has given the name "Fax Number" to Other Info 1.

Text entered in any of the fields in this window for Other Info fields is searched for within those fields case-insensitively (upper or lower case doesn't matter). So for instance you had entered "On Library Committee" as some donor's Other Info 2 value, and you entered "library", "Library", or "LIBRARY" in the field here (without the quotes), that would match, and that donor would be selected for receipting, as long as any other criteria you entered also matched and they had receiptable and so-far unreceipted donations.

#### The Minimum Amount and Minimum Type Criteria

If you enter a Minimum Amount for the donations, you also have to enter a Minimum Type. That has three options, each with a different meaning:

1. **Include all donations from donors with at least one donation  $\geq$  the Min. Amount:**  
This selects only donors who have at least one individual donation line whose Amount is at least the Minimum Amount, but then selects all unreceipted donations for those donors.
2. **Include all donations from donors whose donations total at least the Min. Amount:**  
This selects only donors where the sum of the Amounts of all unreceipted donations for that donor is at least the Minimum Amount, and includes all of those unreceipted donations.
3. **Include only donations that are themselves  $\geq$  the Min. Amount:** This only includes unreceipted donation lines whose Amount is at least the Minimum Amount, and excludes any smaller amounts from the receipt for the donor.

Note that the options are not actually numbered on the Selection Criteria for Receipts window - they are just given numbers here for easy reference in the following discussion.

#### Why Use Filtered Receipts?

Here are a couple of reasons you might use **Receipt  $\Rightarrow$  Filtered Donors**. Some charities may choose to only issue receipts for donations of at least a certain dollar amount, to cut down on their administrative costs - if that is allowed in their country. To get this effect, just enter your desired minimum for "Minimum Amount", and select either option (1) or option (3) above for the Minimum Type. Of course, you are allowed to send receipts to donors with smaller donations, so option (2) is also available, and you may choose to just use **Receipt  $\Rightarrow$  All Donors** if you prefer.

One minor problem with options (1) and (3) is that if a donor gave your specified minimum amount but it was split between two donation Categories (say part for "General" and part for "Special Project") then a receipt will not be issued with the specified Minimum Amount using Option (1) or (3), because each individual donation line you entered was for less than that amount.

If this situation is a problem for you, you can use option (2) instead, because it is not affected by that problem. Alternatively, to check for such problems, you can use **Reports  $\Rightarrow$  Donation  $\Rightarrow$  Unreceipted Donations** to list all donations that have not received a receipt, and watch for this problem. The report is sorted by name then date, so you can look for two donations from the same person on the same date adding up to your minimum amount or more. If you find any such donations, just use **Receipt  $\Rightarrow$  Current Donor Original** to issue a receipt for that donor individually.

One organization asked us about issuing sets of receipts separately for two major campaigns they were doing. This could be handled by giving either donors or donations to those campaigns a special Category value, then filtering on that category value.

Very occasionally a donor who has multiple unreceipted donations will need a receipt for just one of their donations, or a range of dates of their donations, for some special reason. That can be handled by using the Dates Received criterion, setting the From and To dates to the appropriate dates. You will also need to use some donor criterion that restricts the selection to just that one donor. (You may need to temporarily save some special value in a donor field for that donor, perhaps one of the Other Info fields, to give you something to successfully filter on.)

Another case where you might want to use the Dates Received criteria would be if your organization is having an official name change, and all donations up to a given date should have receipts with the old name, and all later donations should have receipts with the new name. You could just create all receipts after you enter the donations up to the name change date, and before you enter any later donations, with **Receipt ⇒ All Donors**, and then make the name change after that. But if you miss your chance to do that (you have already entered later donations), you could use the From and To Dates Received to create the receipts for only the donations from the start of the year up to the name change date. Then once that is done, make the name change in **Maintenance ⇒ Organization Info**.

#### What if the Receipts are Wrong?

If you have generated the receipts, and you look at them on-screen, and the wrong donors or donations seem to have been selected, **do not print them**, save them to PDF or email them. When you do any of those actions, they are saved to the database. Instead, just click **Close** on the Reports window on which the receipts are being displayed. The receipts will then not be saved back to the database.

If you have printed the filtered receipts, and then decide that they are incorrect, in many cases you can delete them from the database, with the **Receipt ⇒ Delete Range** [menu option](#).

After this, try again with **Receipt ⇒ Filtered Donors**, changing your criteria as appropriate, or just use **Receipt ⇒ All Donors**.

#### For Canadian Users

As with **Receipt ⇒ All Donors**, you might have to run up to 4 versions of filtered receipts, depending on the types of donations you have recorded that match the filter criteria. If you have cash donations with advantage ([split receipting](#)), and also ones without advantage, you will have to run this twice to generate the receipts for donations with and without advantage. And if you have [Gift in Kind](#) donations, you have to use **Receipt ⇒ Gift in Kind Receipts ⇒ Filtered Donors**, possibly twice if you have such donations with and without advantage. You can follow the links in the previous sentences for further details.

## 19.10 Handling Non-Receiptable Donors and Donations

Some entire donors or individual donations should never be included in official charitable receipts created with the **Receipt** menu options, for various reasons.

An example of a non-receiptable donation would be if the donor is actually purchasing something of value for the money they gave you.

An example of a non-receiptable donor, at least in Canada, is another charity or foundation - you are not supposed to give them official charitable receipts. (More generally, for Canada, this applies to what the Canada Revenue Agency calls a "qualified donee".)

**It is ultimately your responsibility to understand which donations can receive an official tax receipt, and to record them in DONATION accordingly.**

#### Non-Receiptable Donations

Sometimes you receive donations that should not be included in a charitable receipt. Most commonly, this would be because the donor has already received a receipt from a 3rd party

source, such as an Internet charitable donation service. Or, it could be a donation to you from another charity, or another type of income that you are recording, such as membership dues, that are not eligible for tax deductions. It could be a donation that is so small that your policy is to not issue receipts for that small an amount.

For Canadian users, there is also a rule about what the Canada Revenue Agency calls donations with [advantage](#). In general if the advantage amount (the difference between the entered Total Amount and Eligible Amount) is more than 80% of the Total Amount, the donation should not be receiptable.

There are two ways to prevent a specific donation from ever being included in a receipt, either of which is sufficient.

1. Use any Category value that is exactly "Non-Receiptable" or starts with "NR " ("NR", plus a space), or ends with " NR" (a space, plus "NR"). Some examples are "General NR" or "NR General". (Do not include the quotation marks in the Category name!) These values are set up with the **Maintenance ⇒ Donation Categories** [window](#). ("NR" is an abbreviation for "Non-Receiptable".)
2. Select one of two special values available in the Cheque No / Paid By field for the donation: "Non-Receiptable" or "Pre-Receipted". (You can select them from the drop-down list of options for that field.) Both "Non-Receiptable" and "Pre-Receipted" have exactly the same effect. Both are provided because you may feel that one or the other covers the situation of a given donation more accurately.

NOTE: These rules are not actually case-sensitive, so Category or Cheque No / Paid By values like "NON-RECEIPTABLE" or "non-receiptable", or Categories starting with "nr " or ending with " nr", will also have the same effect of making the donor non-receiptable.

#### Non-Receiptable Donors

To prevent a specific donor from **ever** having its donations receipted, set the donor's Category 1 or Category 2 value to "Non-Receiptable", or anything starting with "NR " ("NR", plus a space), or ending with " NR" (a space, plus "NR"), such as "NR Member" or "Member NR". ("NR" alone is not sufficient - it must start or end with that, **and** have an extra space as explained in the previous sentence. Again, do not include the quotation marks in the Category name!) If there is currently no such value on the drop-down lists for those fields, you can set it up on one of those lists with either the **Maintenance ⇒ Donor Category 1** or the **Maintenance ⇒ Donor Category 2** [window](#).

As with the rules for donations, these rules are not case-sensitive.

When you add new donations for a donor whose Category 1 or Category 2 value is Non-Receiptable, you may optionally also optionally set the Category or Cheque # / Paid By value for that donation to a Non-Receiptable value. However, that is not required. No donation for a Non-Receiptable donor will ever be included in a receipt, no matter what its donation Category or Cheque # / Paid By value is.

Note: in versions prior to 3.23c of DONATION, when you added new donations for Non-Receiptable donors, their Cheque # / Paid By value was automatically set to "Non-Receiptable". That is no longer the case, starting in version 3.23c, since it is not required, and doing so could make you incorrectly think that it was required.

### Correspondence for Non-Receiptable Donations

Although non-receiptable donations should not be included in official charitable receipts created with the **Receipt** menu options, you will almost certainly want to acknowledge those donations in some way.

For individual non-receiptable donations, a thank-you letter of some sort could be done, with the **Letters** ⇒ **One Letter** [menu option](#), using the Current Donation Information option in section 1 of the window that comes up.

For non-receiptable donors, who have multiple donations, a thank you letter could be done with the same menu option, but using the Total Donations Information option in section 1. These letters could also be done in a group with the **Letters** ⇒ **Mass Mailing** [menu option](#), using that window's ability to Filter the donors the letters are going to, to restrict to only the Donor Category 1 or Category 2 value that you use to indicate that donors are non-receiptable.

### Non-Receiptable Donations and Bank Deposits

If you have configured bank deposits in DONATION with the **Maintenance** ⇒ **Configure Bank Deposits** [menu option](#), part of that configuration is to associate accounts in your accounting program with donation categories.

You may want to have non-receiptable donations associated with different accounts in your accounting program than receiptable donations. The only way to achieve that is in the window for [associating accounts with categories](#), by having different donation categories associated with different accounts.

If a specific donation is considered to be non-receiptable either because the donor is marked as non-receiptable (with a Donor Category 1 or Category 2 value), or because the Cheque # / Paid By value "Non-Receiptable" or "Pre-Receipted" is used, the elements of the program that associate accounts with categories for bank deposits will **not** notice that distinction. They will still be associated with whatever account is matched with the donation category that was used. The **only** way to ensure that a specific non-receiptable donation is associated with a different account, is to use a different donation category for it (not a category that is also used for receiptable donations). That could be a donation category that implies to the program that it is non-receiptable (one starting with "NR " or ending with " NR"), but does not absolutely have to be, as long as its use will be clear to you. Once you have a separate donation category for it, you can associate a different account with it.

## 19.11 Deleting Receipts

On occasion you may create some receipts with one of the Receipt menu options, print them off or save them to PDF (which saves them in the database) and then decide that you don't want those receipts to exist. (If you [email](#) them, which also saves them to the database, you can't delete them, because donors will have received them! Instead, if there's a problem with them, you should [correct](#) them.)

If you have set a [Receipt Password](#), entering it is required to delete receipts. You can do that by entering it when the program starts up (if you have also set a Program Entry password), or when you do this menu option that requires it.



Reasons for deleting receipts might be that you observe errors in them and want to fix them without the complications of [Generating Corrected Receipts](#), or you were just testing out creating receipts mid-year, and you really wanted to only generate year-end receipts.

If you want to delete some receipts, but aren't sure which ones, you can use **Reports ⇒ Receipt ⇒ All Receipts** to see a numerical list of all receipts that have been issued for the current year.

You can delete receipts that you have created, subject to two limitations:

1. You should only delete receipts that have **not** been sent to the donors. Obviously, the program cannot enforce this, but it does remind you of this limitation. If you have already sent a receipt to the donor and need to correct it in some way, follow the instructions in [Generating Corrected Receipts](#).
2. You can only delete a range of receipt numbers that end with the current last receipt number for the current year. This is because if you delete a range of receipts in the middle of the current receipt numbers, there will be a gap in your receipt numbering, which is not good in terms of accounting controls. In Canada, the Canada Revenue Agency requires that all of your receipts be sequentially numbered.

If you are satisfied about these two limitations and do wish to delete a range of receipt numbers, select the **Receipt ⇒ Delete Range** menu option. This brings up the Enter Receipt Numbers window, with the current last receipt number filled in for both the "From" (starting) and "To" (ending) number of the range of receipt numbers to delete. If you accept that default, it will just delete the very last receipt that has been created. To delete a larger range or receipt numbers, change the "From" number. (You cannot change the "To" number, because of limitation (2) listed above.)

When you are satisfied with the range, click OK. It will confirm that you want to delete that range, and then if you answer Yes to go ahead, it will delete the receipts in that range, and tell you whether or not it was successful in doing so.

**Deleting receipts does not delete the donations that were included in those receipts!** It merely removes the record of the receipts having been issued from the database, and removes the Recpt # field values from the donations that were included in those receipts.

**Please Note:** Once you have deleted a range of receipts, there is no way to get them back, unless you have a [Database Backup](#) that you made immediately before the deletion, and you [Restore](#) that backup.

#### What if I want to Delete a Receipt in the middle of the Receipt Number Range?

Since you cannot do that, as explained above, you will have find another way to deal with whatever the underlying problem is that leads you to want to delete that receipt. Most likely that will be by making some changes then creating a [Corrected Receipt](#).

For instance, if the receipt was for donations that should have been recorded for a different donor, you could delete those donations, create a corrected receipt for the original donor (which will be for \$0), then re-enter those donations for the correct donor and create a new receipt for them.



### Deleting Canadian Replacement or Correction Receipts

Starting in version 3.64 of DONATION, for Canadian users, when a replacement or correction receipt is created, it gets a new receipt number, and the old receipt is retained and marked "Cancelled". See [Replacement or Correction Receipts for Canada](#) for more details.

This creates an odd issue if you are deleting a replacement or correction receipt, but the original receipt that it replaced or corrected is not being deleted. In that case, the effect of the deletion is to basically remove the fact that the original receipt was replaced or corrected, without deleting that original receipt. So, the donations that were included in the receipt being corrected have their Recpt # field set back to be the receipt number of the original receipt, and that original receipt's type is set back to its prior type. That will usually mean that the undeleted replaced or corrected receipt is now considered to be an original receipt again.

One more complex case where this will not be the case is for instance if receipt number 5 corrected receipt number 2, and then receipt number 5 was itself corrected by receipt number 10. If you then delete receipt number 10 (but not numbers 5 or earlier), receipt number 5 will revert to saying that it is a correction of receipt number 2.

This brings up a case where the deletion action will not be entirely correct, but unfortunately there is no obvious way to work around it. That is the case where the corrected receipt was for a different dollar amount than the original receipt, because donations were either deleted from it or added to it prior to the correction. If the correction receipt is then deleted, and its donations moved back to belong to the original receipt number, that original receipt will end up being for the same dollar amount, and including the same donations, as the deleted correction receipt. So, that original receipt will actually have been modified from its very original state.

## 19.12 Emailing Receipts, Letters and Statements

You can email the built-in or [mail-merged receipts](#) to those donors for whom you have entered an email address in the Donor Details area. You can also email [statements](#), and any letters created with the **Letters** [menu options](#).

Before you can do any of this, you need to [configure email sending](#) from the program, via the **Maintenance** ⇒ **Email Sending Configuration** menu option.

While the options described here allow you to email generated receipts, letters and statements to donors as an attachment, there may be cases when one of the other methods for emailing to donors from DONATION (the **Letters** ⇒ **Email Donors** [menu option](#) or [Using Mass Email Services](#)) would be more appropriate. Please see [Using Mass Email Services](#) for a full discussions of the pros and cons of each method.

Before emailing receipts, you will also need to specify a scanned [signature bitmap](#) to go on the receipts, since obviously you can't sign them by hand!

Once you have created receipts with options such as **Receipt** ⇒ **Current Donor Original**, or recreated them with an option such as **Receipt** ⇒ **Reprint Range** or **Letters** ⇒ **Mass Mailing**, you will see a button on the built-in receipt viewing window labelled **Email/Print**. In the mail merge editor for any letters, statements, or mail-merge receipts, the emailing is done with the **File** ⇒ **Email/Print** menu option, and a corresponding toolbar button. (You can also use

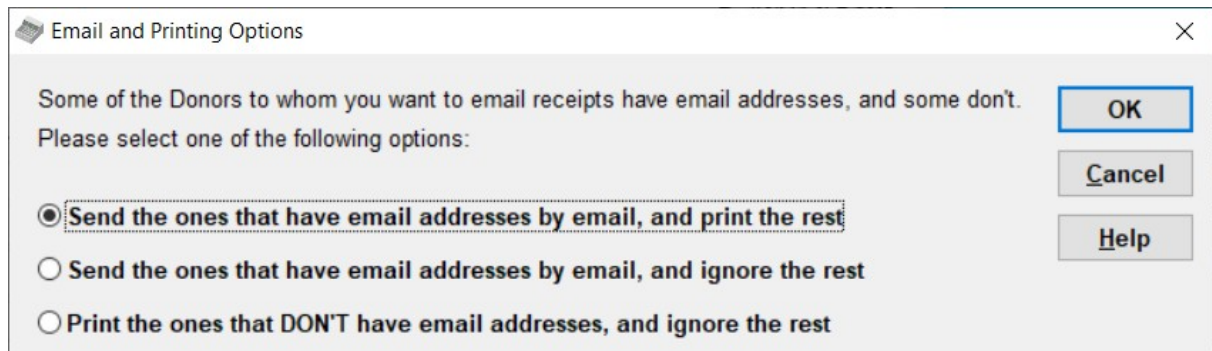
**Receipt** ⇒ **Current Donor Sample** for testing - receipts created with that option are always emailed to yourself, rather than to the donor.)

The "statement" reports **Reports** ⇒ **Donation** ⇒ **Details, One Page per Donor** and **Category Totals, One Page per Donor**, and the Total Donations Information and Pledge Information mail merges which can be used as statements, can also be sent by email, using the same menu options or buttons.

**Note:** Sending mass emails from any program can be unreliable. The emailing can fail for various reasons. When you are emailing receipts, as long as at least one receipt got emailed successfully, those receipts will be saved back to your database. If there is a problem, you will be told which receipt number it failed on. Once you are clear that you have resolved your emailing problem, you can re-display the receipts that have not yet been emailed with **Receipt** ⇒ **Reprint Range**, and again use the **Email/Print** button to email them.

After clicking the **Email/Print** button or menu option, the program checks to see whether any of the donors whose receipts, letters or statements are displayed have email addresses. If none of them do, you just get a message to that effect, and nothing further is done.

If some of the donors for the displayed receipts or statements have email addresses and some of them don't, a window like the following will then be displayed:



Normally you would leave the default first radio button selected, and press **Enter** or click **OK**. However, there may be situations where you want to use the other options, including cases where you tried this before, the email sending failed but the printing was successful, and you want to try only the emails again.

If all of the donors for the displayed receipts or statements have email addresses, the above window is not displayed, and the program will always try to email to all of the donors. (If there is more than one receipt or statement displayed when this is the case, a message is shown to inform you that none of them need to be printed.)

Next, the following window comes up to confirm the Subject line and Body of the email that will be sent to the donors, with the receipt or statement attached as a PDF file:

**Specify Email**

**From:** Name:  Email:

**Subject:**

**Attachments**

**Automatic:**

**Optional:**

**Insert Field:** «OrgName»

**Body:** Thank you for your donation(s) to Your Organization. Your official receipt is attached, as a PDF file. If you cannot open that file, you may need to download the Adobe Reader from:  
  
http://get.adobe.com/reader  
  
-----  
Dan Cooperstock, Treasurer  
Your Organization  
1 Main Street, Anytown ON,  
123-456-7890

The From Name and Email address in this window will be your name and email address, as [configured](#) in **Maintenance ⇒ Email Sending Configuration**. The signature block at the end of the Body will be based on what you have entered in **Maintenance ⇒ Organization Info**. However, you can edit the Subject line and Body to be however you want them to be. The Body is normally just plain text, so you cannot include fonts or images. (However, see [below](#) for an option for those users who know HTML to change it to HTML, which does allow fonts, images, etc.) Your edits to the Subject and Body will be saved for the next time you email receipts or statements. Please note that once they have been saved once, even if you change the organization info in **Maintenance ⇒ Organization Info**, the signature block in the Body will not change - you will have to also change it there, the next time you email receipts or statements.

You also have the option of adding an additional attachment to the receipts, letters or statements being emailed, by typing a full pathname into the **Optional** field in the **Attachments** area, or using the **Browse** button there to select a file. For instance, you might want to send a newsletter along with the emails.

The three elements above the Body shown in the image above, "Insert Field", the drop-down list, and the **Insert** button, only appear when you are generating the [receipts](#) or creating letters using mail merge, not using the regular built-in report-style receipts. The "Insert Field" drop-down list contains most of the same data fields that you can merge into the type of mail-merge document you are emailing. Selecting a field from that list then clicking the **Insert** button inserts that merge field at the current cursor position in the Body. If you insert fields in that way, each email body will be personalized using that donor's data for the inserted fields. Probably the field

you would most likely insert would be «Name», the donor's full name (or business name, if there is one). For details on all of the available merge fields, see [Mail Merge Fields](#).

Although the **Insert** button only inserts fields directly into the text Body of the email, you can actually cut or copy and paste them from there into the Subject line for the email, and that will also cause the donor's data to be merged into that Subject line.

After clicking **OK** in that window, the program will start to create PDF files for each receipt or statement for each donor that has an email address, then send those as an email attachment, with the Subject line and Body you specified in the window above, and the optional additional attachment. (Of course, if you selected to skip sending emails, and only print, in the first window above, this step will not be done.)

Next, after a message telling you how many emails were sent, unless you specified to skip the printing for donors without email addresses in the first window above, it will print those ones to your printer. Obviously, those ones then need to be mailed out or distributed directly to the donors as usual.

There is one tricky part about the ones to be printed to your printer, when you are using mail merge receipts or statements. For technical reasons, when the Print dialog box comes up, the program is unable to automatically change the default printer back from the novaPDF printer used to create the PDF files to your regular printer. You will have to select the correct real printer, before clicking **Print**. This is not a problem when you are using the built-in receipts or statements.

You also need to pay careful attention to any email receipts that bounce back to you, due to bad email addresses for the donors etc., or ones you receive error messages about during the emailing process. Those donors will thus not have received their receipts, and you will want to print and send them normally. (Or, contact the donor, obtain a corrected email address for them, and re-send them by email.) You can reprint a receipt that bounced back with the **Receipt ⇒ Reprint Range** [menu option](#). This issue with bounced emails is not as big a deal with statements, because it's not crucial that donors receive their statements.

**Note:** Because the emailing is done by an email sending component that is part of DONATION, with no connection to any email program that you use normally (such as Outlook), there is no record of which emails were sent to which donors in the Sent Mail folder of your email program. To get a blind copy of each email that is sent, you can check the "Bcc: to yourself" checkbox in the **Maintenance ⇒ Receipt Options** [window](#).

#### Warning about Editing Mail-Merge Document(s) before Emailing

If you are emailing mail-merged receipts, letters, or statements to more than one donor, there is no point in making any edits to the documents before you start the Email/Print process, because they will be lost. (An example of why you might want to make such edits would be to further personalize the documents.)

The reason there is no point in doing that is that the program re-generates each mail-merged document one at a time, before saving it as a PDF and attaching it to an email to the relevant donor. As a result, any prior edits are lost.

If you do want there to be edits, you should either make them in the mail-merge template (if they apply to all donors), or only generate one donor's receipt, letter or statement at a time, in which case any changes you edit in before starting the Email/Print process **will** be included in the PDF attachment.

Any edits you make are always included if you only Print the documents, rather than choosing the Email/Print option.

### Using HTML in the Body

You can actually send the body of the email as HTML, if you are very familiar with it, by having "<html>" (without the quotes) as the very first thing in the body, and ending it with "</html>". Of course, other appropriate changes have to be made to make it valid HTML that will display well, and you need to be cautious with what HTML elements you use, because not all email programs and devices display complex HTML well.

As soon as you prefix the body text with "<html>", a button appears saying **Show HTML in Browser**, right above the editing area for the body. Clicking that will display the body in your default web browser (such as Internet Explorer, Firefox or Chrome), so you can see how it looks. However, as mentioned above, complex HTML may look fine in your web browser may not come out well in all email programs.

See the Help topic [HTML in Emails to Donors](#) for some very simple examples and instruction.

### **Warning about being classified as a SPAMmer!**

If you have very large numbers of donors with email addresses that you send receipts or statements to, it is possible that either your Internet Service Provider (ISP) or the ISPs of the recipients of your emailed receipts or statements will classify you as a spammer, when you send lots of emails very quickly as the program can do. This is a general problem with sending large numbers of mass emails, and is very hard to work around.

Adding an optional attachment, in addition the automatic attachment for the receipt, letter or statement, may slightly increase the likelihood of being classified as a spammer.

It is impossible to give a specific number of emails at which this might start being a problem. In our experience sending emails to the users of the DONATION program, We started observing the problem when we had a few thousand users. But we would guess that the problem could start when you email quickly to as few as a hundred donors.

There is unfortunately no simple way to get around this problem. (We get around it for our communication with our customers by using a commercial [mass email sending service](#), that works closely with all ISPs to ensure that their emails are not classed as SPAM. But there is no way to use an email-sending service to send the emails containing a different receipt or statement for each donor.) So, if you do have very large numbers of donors with email addresses, you may want to think carefully about whether or not to use this feature for emailing receipts or statements from within DONATION.

One thing that might help would be to email the receipts or statements in smaller batches, and only do a certain number per day. The program will only generate receipts in batches of 500 anyways, so you might do one of those batches per day, when you are generating the year-

end receipts. We cannot in any way guarantee that this will prevent you from being classified as a spammer, but it makes sense that it might help.

It's also possible that your ISP will restrict you to sending a certain number of emails per day, or a certain number within a given period of time (like an hour), even though they aren't classifying you as a spammer for trying to exceed that.

If you do have large numbers of donors with email addresses, one thing you could do is to talk to your ISP about their sending limits for emails with attachments. Ask what quantities per day or hour you need to limit yourself to, to prevent your ISP classifying you as a spammer, and adjust your email sending of receipts accordingly.

We should also mention that we have been told that sending HTML emails without an included plain-text version is more likely to trigger SPAM detection on the part of your recipients than plain-text emails. To help prevent that, the program converts the HTML version to plain-text version, and includes both. (Only one will be shown when recipients view the email, usually the HTML version, unless the recipient has configured their email program to never show HTML emails.)

#### Handling halts in the emailing

If your Internet Service Provider, through which you are sending the emails, immediately reports back to the email software used by DONATION that one of the email addresses you are sending to is invalid, you will get an error message and the process will halt. If you are doing a mass email, this could be a problem, because you need to fix it (if possible) and resume sending later at the same or following email.

So the first thing you do is exit the statement or receipt window, and fix that email address on DONATION's main window, or remove the email address. Then recreate the mail merge or report that you want to send by email.

If it was a mail merge that you were trying to email, created with the **Letters ⇒ Mass Mailing menu option**, use the checkbox in section 2 of the Merge Letters window to Filter the data before merging it. After clicking **Merge**, check the sort order in the displayed data (it will usually be by last name then first name), and devise a filter to resume at the desired person. (See [Filtering Reports](#) for details.) For instance, to resume at "Cooperstock, Dan", use the following filter conditions:

Column	Operator	Value	And/Or
lastname	Greater Than or Equal To	Cooperstock	

That works if there was only one Cooperstock, or none with first names alphabetically before "Dan". Otherwise, if there was another Cooperstock with a first name before "Dan", that you wanted to exclude, you could have to use an [Advanced Filter](#), with the following expression:

```
lastname > "Cooperstock" or (lastname = "Cooperstock" and
firstname >= "Dan")
```

Click OK in the Filter window to display just those donors that satisfy the Filter condition, then click OK in that data viewing window to do the merge. You can then resume emailing.



The approach with something that isn't a mail merge is basically the same - the Statement reports are also in order by last name then first name, so you can use the same sort of Filter. And receipts are usually ordered by receipt number, so if you are using say **Receipt** ⇒ **Reprint Range**, just specify a range of receipt numbers that starts at the correct point.

#### Emailing receipts or statements only to yourself, for testing

You should probably test this feature for emailing receipts or statements out first, before actually emailing them to the donors. To do that, go to the **Maintenance** ⇒ **Receipt Options window**, and check the "Email receipts, letters and statements only to yourself, for testing" checkbox. Having done that, create (or recreate) your receipts, letters or statements, and select the **Email/Print** button or toolbar icon on the window they come up in. All displayed receipts or statements for donors that have email addresses will be emailed to your own email address (as set in **Maintenance** ⇒ **Email Sending Configuration**) rather than to the donors' actual email addresses. (However, they will say they were sent to the donor's name, to help you identify who would have gotten what if you weren't using this option.)

When you are doing this for testing, if the Email and Printing Options window displayed above comes up, you will probably want to select the 2nd option, "Send the ones that have email addresses by email, and ignore the rest", to avoid wasting paper printing any others. (Of course, if you do want to see the others printed, you can certainly select a different option!)

Sample receipts are also always only emailed to yourself.

#### Concerns for Canadian Users

In the Canada Revenue Agency's page on [Computer-generated Receipts](#), there is some discussion of sending receipts by email. Here are the most relevant sections:

9. Registered charities sending official donation receipts by e-mail on the Internet should ensure that the receipts are in read only or non-editable format. The recipient donor should only be able to read and print the receipt. The intent is to safeguard registered charities against fraud, for example, by preventing a donor from changing the amount on the receipt.

10. Computer software is available for registered charities to protect their receipts from hackers during the transmission. Charities can use a secure electronic signature, which means that the document is encrypted and signed with an electronic signature such as entrust technology. The receipt would then be generally safe from outside hackers or the recipient would know if someone had altered the contents of the receipt that was sent. The use of the secure electronic signature should be kept under the control of a responsible individual authorized by the registered charity.

PDF files are generally considered to be read-only, and DONATION does encrypt the PDF receipts and reports it creates, which means that although they can be read by the recipients without knowing any password, they cannot be modified in any way unless you know the password, which we do not give out!

However, we do not currently protect PDF receipts with a secure electronic signature, which would verify that they had not been tampered with in any way. (This is a different issue from



the [bitmap signature](#) that you add to the receipts, which is also required.) Fortunately, the CRA's point (10) above only says that charities "can" do this, it does not make it mandatory.

## 19.13 HTML in Emails to Donors

When you are emailing receipts to donors, created with the **Receipt** menu options, or using any **Letters** menu options that allow you to email mail-merge letters or just simple emails with or without attachments, it is possible to put HTML and CSS (the languages of web pages) into the Body of the email, when this window is displayed:

Specify Email

From: Name:  Email:

Subject:

Attachments

Automatic:

Optional:

Insert Field:

Body:   
 -----  
 Dan Cooperstock, Treasurer  
 Your Organization  
 1 Main Street, Anytown ON,  
 123-456-7890"/>

This option is primarily for users who are very familiar with HTML, but we are including some very simple examples here for others who might want to make minimal use of HTML, for instance to include an image or a link to a web page. We will not be covering any CSS (Cascading Style Sheets), which is much more complex, and allows for more detailed formatting.

To tell the program you want the Body of the email to be sent as HTML, you need to put "<html>" (without the quotes) as the very first thing in the body, and end it with "</html>". Between them, you will have to make other appropriate changes to make it valid HTML that will display well, and you need to be cautious with what HTML elements you use, because not all email programs and devices display complex HTML well.

As soon as you prefix the body text with "<html>", a button appears saying **Show HTML in Browser**, right above the editing area for the Body. Clicking that will display the body in your default web browser (such as Internet Explorer, Firefox or Chrome), so you can see how it

looks. However, as mentioned above, complex HTML may look fine in your web browser but may not come out well in all email programs. Please be sure to use this button to review any changes you put in with HTML, to make sure they at least look how you want them to in a web browser, before you send the email!

By the way, technically you should actually start your HTML with "<html><body>" and end it with "</body></html>", but omitting the "body" parts should not cause any problems.

### Changes You Need to Make

The first thing to understand, for beginners with HTML, is that white space (spaces and line breaks) is all treated as just spaces, and multiple bits of white space are treated as just one space. So the example in the image above, if you merely surrounded it with "<html>" and "</html>", it would come out as one long paragraph!

To fix that, you need to replace line breaks with "<br />", without the quotes. To get a blank line, you use two of them. So the above example, converted to HTML that looks mostly the same, would be:

```
<html>Thank you for your donation(s) to Your Organization. Your
official receipt is attached, as a PDF file. If you cannot open that
file, you may need to download the Adobe Reader from:
<br /><br />
    http://get.adobe.com/reader
<br /><br />
-----<br />
Dan Cooperstock, Treasurer<br />
Your Organization<br />
1 Main Street, Anytown ON, <br />
123-456-7890<br />
</html>
```

Because of what we said about white space (including line breaks) being compressed into one space, it is OK that the lines with "<br /><br />" are their own lines. Doing it that way makes it easier to read.

The next problem in that HTML is that the link to the Adobe Reader, <http://get.adobe.com/reader>, may not show up as a hyperlink in the emails that get sent, because it is not marked as such in the HTML. (Some email programs might display it as a hyperlink anyways.) To be sure it is a Hyperlink, change that line to:

```
<a
href="http://get.adobe.com/reader">http://get.adobe.com/reader</a>
```

Here the part in the quotes after "href" is the URL (web address) that the hyperlink will point to, and the part between the two sections surrounded by angle brackets ("<" and ">") is what gets displayed in the email as the hyperlink.

Also, although the hyperlink to the Adobe Reader in the first example above appears to be indented several spaces, again because of the compressing of multiple bits of white space into one space, it will only display in the emails as indented one space. To really indent something several spaces, use several occurrences of "&nbsp;", which is a "non-breaking space", that is

```
&nbsp;&nbsp;&nbsp;&nbsp;<a  
href="http://get.adobe.com/reader">http://get.adobe.com/reader</a>
```

```
<html>Thank you for your donation(s) to Your Organization. Your
official receipt is attached, as a PDF file. If you cannot open that
file, you may need to download the <a
href="http://get.adobe.com/reader">Adobe Reader</a>.
```

Suppose you want it at the very top of the email. An example of doing that would change the start of the HTML to:

```
<html><br />Thank you for  
your donation(s) to Your Organization ...
```

Some email programs will not display linked images unless the person reading the email chooses an option to display the image.

A basic introduction to HTML starts at [https://www.w3schools.com/html/html\\_intro.asp](https://www.w3schools.com/html/html_intro.asp).

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## 20 PRINTING MAILING LABELS OR ENVELOPES

### 20.1 Receipt or Donor Mailing Labels

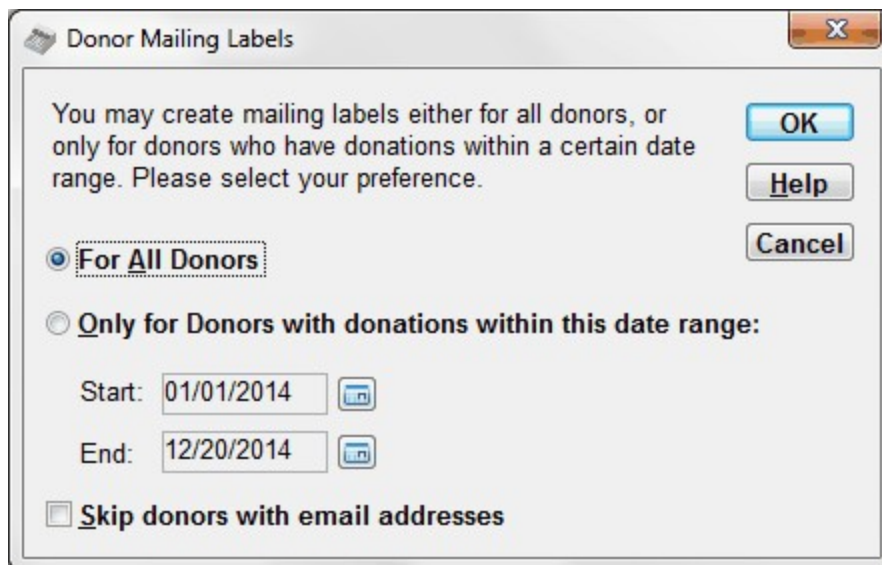
The **Mailing Labels** options under **Reports** ⇒ **Receipt** and **Reports** ⇒ **Donor** allow you to print or view mailing labels for all receipts generated on a given date, or for all or selected donors. You might want to use this option for receipts after creating them for **All Donors** at the year-end (or any other time you use **Receipt** ⇒ **All Donors**).

**Note:** You can also create [envelopes](#) for receipts or donors.

Currently two types of laser-printer label are supported. You are allowed to select the type when you choose to create Mailing Labels in the program. The first is 4" x 1", such as Grand and Toy 99189 or Avery 5161, 5261, 5961 or 8161 labels. There are 20 labels per page. The second is 2.625" (i.e. 2 5/8") x 1", such as Grand and Toy 99789 or 99180, or Avery 5160, 5260, 5960 or 8160. These have 30 labels per page. Presumably there are equivalent sizes from other suppliers as well. Just buy one of these types of laser or inkjet printer paper, put it into your printer, and print directly on to it.

The exceptions to this are **Reports** ⇒ **Donor** ⇒ **Mailing Labels with Member/Env #** and **Envelope Box Labels**. They are only available in the 4" x 1" size. For the first of these two types of labels, this is because on the smaller labels there is not enough room to fit the name and member/envelope number on one line, if the last name happens to be quite long.

After selecting the type of labels (in the mailing label reports that allow you to do so), the **Reports** ⇒ **Donor** mailing labels reports (except for **Envelope Box Labels**) then prompt you with the following window:



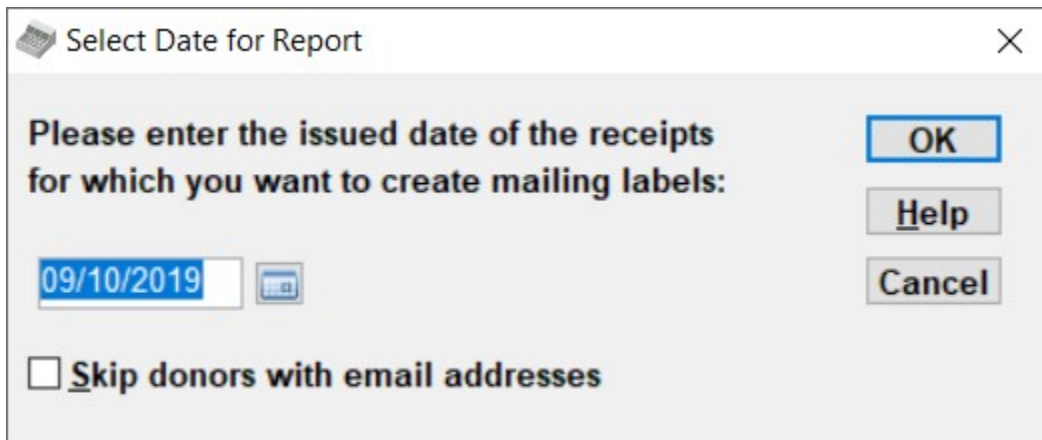
This allows you to either create mailing labels for all donors or for donors who have donations in a range of dates that you can specify. The latter option is valuable if you are creating labels to send out mailings created with **Reports** ⇒ **Donation** ⇒ **Details, One Page per Donor** or **Category Totals, One Page per Donor**, or with **Letters** ⇒ **Mass Mailing**, using the Individual Donations Information or Total Donations Information options. That is because all of

those only include donors with donations within a specified range of dates, so you would only want donor mailing labels for those same donors.

Checking the "Skip donors with email addresses" checkbox allows you to omit any donors who have email addresses from the batch of labels that you are creating. That would be useful if those donors had already been sent something by email, and you only wanted to use postal mail for the other donors, who don't have email addresses.

On both the 2.625" x 1" labels, and the labels with member/envelope number included, the first name is sometimes abbreviated (for example "D. Cooperstock" instead of "Dan Cooperstock") to leave room for the rest of the name and/or the member/envelope number within the space available on the line.

The **Reports** ⇒ **Receipt** ⇒ **Mailing Labels** report prompts you with the following window:



Select Date for Report

Please enter the issued date of the receipts  
for which you want to create mailing labels:

09/10/2019

☐ Skip donors with email addresses

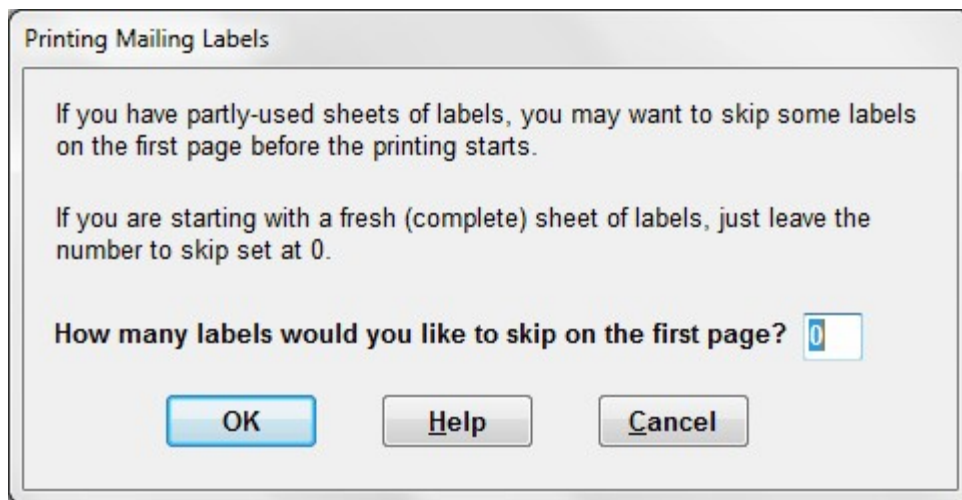
OK  
Help  
Cancel

As you can see, it first asks for the date on which the receipts were issued. That is the Date or Issued Date printed on the receipts. If you aren't sure of the date, and don't have the receipts in front of you to look for the date printed on them, you can look them up with the **Reports** ⇒ **Receipt** ⇒ **All Receipts** report. Mailing labels will be printed for all donors for whom receipts were issued on that specified date.

The date displayed initially will be the last date on which you issued receipts in the current working year.

The window also allows you to specify that you want to skip creating the mailing labels for donors who have an email address. (Those donors might have had their receipts sent by email, and thus wouldn't need a mailing label.)

When you click the **Print** button to print any of these mailing label reports, the following window comes up:



Just follow the instructions on this window. Simply click OK if you are printing on new label pages. If you want to start by re-using a partly used page, though, count the number of labels that have already been used on it, and enter that number in the box. **Please note that this is not skipping the labels displayed in the report window! It is skipping spaces for labels on the first page of label paper.**

If the built-in mailing label reports aren't sufficient for your purposes, you could consider [Generating Mailing Labels using Mail Merge](#), though those instructions are moderately complicated.

### Margins

Occasionally we hear from users that the mailing labels aren't lining up properly on their printer, so that they don't fit quite right on the actual label paper. If you have this experience, you can try adjusting the print margins using the **Margins** button that appears on the window for viewing the labels, before you print them. Although you can adjust all four margins, most likely adjusting only the Top and/or Left margin should be sufficient.

### Filtering Mailing Labels

The various donor mailing label reports have several extra fields in them that aren't displayed, for use in sorting or filtering, including the two Donor Category fields, the six Other Info fields, the Email address field and a Total Amount donated this year field. The receipt mailing label reports have the Email address field as an extra field.

An example of how you might use this is for creating labels for only those "donors" who have not yet donated anything this year. After the labels report has been displayed (with "For All Donors" selected), click **Filter**, and enter the following Filter condition:

Column	Operator	Value	And/Or
total_amount	Equals	0	

Click **OK** on the filter window, and the labels will then be restricted to those for donors who have not yet donated anything this year.



## 20.2 Receipt or Donor Envelopes

The **Envelopes** options under **Reports ⇒ Receipt** and **Reports ⇒ Donor** allow you to print or view standard #10 envelopes for all receipts generated on a given date, or for all or selected donors. You could use this option for receipts after creating them for **All Donors** at the year-end (or any other time you use **Receipt ⇒ All Donors**).

**Note:** You can also create [mailing labels](#) for receipts or donors.

The **Reports ⇒ Donor ⇒ Envelopes** report prompts you with the following window:

This allows you to either create envelopes for all donors or for donors who have donations in a range of dates that you can specify. The latter option is valuable if you are creating envelopes to send out mailings created with **Reports ⇒ Donation ⇒ Details, One Page per Donor** or **Category Totals, One Page per Donor**, or with **Letters ⇒ Mass Mailing**, using the Individual Donations Information or Total Donations Information options. That is because all of those only include donors with donations within a specified range of dates, so you would only want donor envelopes for those same donors.

Checking the "Skip donors with email addresses" checkbox allows you to omit any donors who have email addresses from the batch of labels that you are creating. That would be useful if those donors had already been sent something by email, and you only wanted to use postal mail for the other donors, who don't have email addresses.

By using the two checkboxes at the bottom of this window, you can create a return address section at the top left corner of your envelopes, if you don't have pre-printed envelopes for your organization. The first checkbox determines whether your organization name and address (from **Maintenance ⇒ Organization Info**) are included. If that is checked, the second checkbox is available, which determines whether your logo is also included, above the organization name and address. (You can't include only a logo with no name and



address.) The logo is the same file and size (150 x 60 pixels) as for the built-in [receipts](#) - please read that section for details.

The **Reports** ⇒ **Receipt** ⇒ **Envelopes** report prompts you with the following window:

As you can see, it first asks for the date on which the receipts were issued. That is the Date or Issued Date printed on the receipts. If you aren't sure of the date, and don't have the receipts in front of you to look for the date printed on them, you can look them up with the **Reports** ⇒ **Receipt** ⇒ **All Receipts** report. Envelopes will be printed for all donors for whom receipts were issued on that specified date.

The date displayed initially will be the last date on which you issued receipts in the current working year.

The window also allows you to specify that you want to skip creating the envelopes for donors who have an email address. (Those donors might have had their receipts sent by email, and thus wouldn't need an envelope.)

Finally, this window also has the same two checkboxes for the return address and logo as described above for the donor envelopes.

### Filtering Envelopes

The donor envelope report has several extra fields in it that aren't displayed, for use in sorting or filtering, including the two Donor Category fields, the six Other Info fields, the Email address field and a Total Amount donated this year field. The receipt envelope report has the Email address field as an extra field. You can use them with the **Filter** button to print only selected envelopes based on a category or other information.

The simplest example of using this would be to just print an envelope for one donor. To do that, after the envelopes report has been displayed, click **Filter**, and enter the following Filter expression, using the appropriate name in the value field:

Column	Operator	Value	And/Or
--------	----------	-------	--------

name	Equals	<i>Firstname Lastname</i>	
------	--------	---------------------------	--

Click **OK** on the filter window, and only the one label matching that name will be displayed.

Another example is printing donor envelopes for only those "donors" who have not yet donated anything this year. After the envelopes report has been displayed (with "For All Donors" selected), click **Filter**, and enter the following Filter expression:

Column	Operator	Value	And/Or
total_amount	Equals	0	

Click **OK** on the filter window, and the envelopes will then be restricted to those for donors who have not yet donated anything this year.

## 21 FILES USED BY THE PROGRAM

### 21.1 Files Used by the Program

The following are the major files included with or used by the program. They will be in your main program directory, generally C:\Program Files\Donation or on 64-bit computers, C:\Program Files (x86)\Donation.

DONATION.EXE	Main executable program file
COMMON.PBD	Additional part of executable program
DONATION.PBD	Additional part of executable program
REPORTS.PBD	Additional part of executable program
DWCONVERT.PBD	Additional part of executable program
PBREGEXP_PB10.PBD	Additional part of executable program
DONWNVDBCONV.PBD	Additional part of executable program
DW2XLS_PB2019.PBD	Additional part of executable program
PB2XLS.DLL	Used by DW2XLS_PB2019.PBD
DONATION.CHM	The HTML Help file
PBACC190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
PBDWE190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
PBLAB190.INI	Helper file required by the executable program (part of the PowerBuilder runtime)
PBODB190.INI	Helper file required by the executable program (part of the PowerBuilder runtime)
PBODB190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
PBPDF190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
PBRTC190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
PBSHR190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
PBSYSFUNC190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
PBTHEME190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
PBTXTEXT190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
PBUIS190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
PBVM190.DLL	Helper file required by the executable program (part of the PowerBuilder runtime)
libjutils.dll	Helper file required by the executable program (part of the PowerBuilder runtime)
libjcc.dll	Helper file required by the executable program (part of the PowerBuilder runtime)
libjhtml.dll	Helper file required by the executable program (part of the PowerBuilder runtime)

libsybunic.dll	Helper file required by the executable program (part of the PowerBuilder runtime)
msvcr80.dll	Microsoft runtime library needed by the PowerBuilder runtime files
msvcp80.dll	Microsoft runtime library needed by the PowerBuilder runtime files
atl80.dll	Microsoft runtime library needed by the PowerBuilder runtime files
atl100.dll	Microsoft runtime library needed by the PowerBuilder runtime files
tables.sql	Definition of the SQL tables in the database
LICENSE.htm	The Software License Agreement for the program. It can be viewed with <b>Help ⇒ View License Agreement</b> .
Licensing.dll	Helper file required by the executable program
FontHelper.dll	Helper file required by the executable program
HtmlMessageBox.dll	Helper file required by the executable program
ImageViewer2.ocx	Third-party image editing control used by some parts of the program, from Viscomsoft.com
TIFF2PDF.dll	Used by ImageViewer2.ocx

The following files are in the uninstall subdirectory under the main program directory. All of them are used as part of the uninstallation process, should you choose to do so via Control Panel's Add or Remove Programs tool:

IRIMG1.JPG  
 IRIMG2.JPG  
 IRIMG3.JPG  
 irunin.dat  
 irunin.xml

The following files are in the "3rd Party" subdirectory under the main program directory, and give information about 3rd-party licenses to software used by DONATION:

3rdPartyLicense.txt	Mentions all 3rd-party licenses in DONATION
IDPLicense.txt	Part of license for Firebird database software
IPLicense.txt	Part of license for Firebird database software

The following files are in the main program directory, and are part of the Firebird database software:

fbclient.dll	Main Firebird embedded database program file
gds32.dll	Copy of fbclient.dll, needed with this different name by some utility programs
firebird.conf	Configuration file for Firebird (may or may not be present)
firebird.msg	Error message text lookup file for Firebird
gbak.exe	Used to make backups of the database, and to restore such backups
gfix.exe	Used to check that a database is OK, can also be used (with instructions from Software4Nonprofits support) to do certain type of repairs on the database, if it has any problems.
icuuc30.dll	Needed by Firebird
icudt30.dll	Needed by Firebird
icuin30.dll	Needed by Firebird
ib_util.dll	Needed by Firebird
FirebirdService.dll	Software4Nonprofits DLL that provides a backup service for Firebird database

The following files are in a subdirectory of the main directory named "udf":

FreeUDFLib.dll	Provides some extra SQL functions to the Firebird database
ib_udf.dll	Provides some extra SQL functions to the Firebird database

The following file is in the C:\Program Files\Gemini Firebird ODBC Driver 2.0 directory:

fbgem20.dll	ODBC driver for Firebird
-------------	--------------------------

The following files are in your Windows System folder, generally C:\Windows\System32:

GdiPlus.dll	Microsoft runtime library needed by DONATION and/or Firebird (may or may not be installed)
atl71.dll	Microsoft runtime library needed by DONATION and/or Firebird
gdi32.dll	Microsoft runtime library needed by DONATION and/or Firebird (may or may not be installed)
ChilkatAx-9.5.0-win32.dll	Licensed third-party library used to send emails, upload and download files from websites, etc.
wodCrypt.dll	Licensed third-party library used for encryption and compression of <a href="#">emailed backups</a>

There are a number of files in a novaPDF subdirectory under the main program directory, which constitute the novaPDF printer driver used by DONATION for [Saving Reports, Receipts and Letters as PDF Files](#). The installation of this printer driver also installs a novaPDF menu under **Start** ⇒ **Programs** on your computer. There is an uninstall option in that menu.

The following files are in the main [Data Directory](#) for the program, whose location varies by your version of windows:

DONATION.ini	Holds various settings stored by the program (most of which were stored in the Windows Registry in versions of DONATION prior to 3.30).
databases.txt	Holds your list of databases, if you use the <b>Database</b> ⇒ <b>Switch Databases</b> <a href="#">menu option</a> to create and switch between multiple databases for multiple organizations.
donsl.txt	Holds your license key(s), for versions of DONATION other than the legacy Lite version (which does not need license keys).
donupdt.exe etc.	Any installation files that are downloaded for you by the <b>Tools</b> ⇒ <b>Check for Updates</b> <a href="#">menu option</a> are stored in this directory.
<i>anything.sql</i>	Any saved SQL files, from the <b>Database</b> ⇒ <b>SQL Select</b> <a href="#">menu option</a> 's <b>Save to SQL File</b> button, are by default stored in this directory, unless you choose to navigate to a different directory in the Save As dialog box that comes up when you are saving them.

The following log files are in your Windows Temp directory, whose location varies by your version of windows. The program displays these files to you if it needs to do so. All of these files are empty if the process they are a log file for was successful, and contain error messages (which are displayed to you by DONATION) if the process was unsuccessful.

BACKUP.LOG	Created each time you do a <b>Backup/Restore</b> ⇒ <b>Backup Database</b> , shows whether or not it was successful.
------------	---

RESTORE.LOG	Created each time you do a <b>Backup/Restore</b> ⇒ <b>Restore Database</b> , shows whether or not it was successful.
VALID.LOG	Created each time you do a <b>Database</b> ⇒ <b>Validate</b> , shows whether or not it was successful.
CREATE.LOG	Created each time you create an additional database with <b>Database</b> ⇒ <b>Switch Databases</b> , shows whether or not it was successful.

The following files are in the DATA subdirectory **under** the main [Data Directory](#) for the program, whose location varies by your version of windows:

DONATION4.DB	The database of all of the information you enter.
DONATION4.EMPTY	An empty database that is used to create new databases when you use <b>Database</b> ⇒ <b>Switch Databases</b> .
DONATION4.ext	Additional databases that you have created using <b>Database</b> ⇒ <b>Switch Databases</b> .

The following files are in the Letters subdirectory under the main [Data Directory](#) for the program, whose location varies by your version of windows:

donors_merge.htm	Sample mail merge letter with Donor Information only
donations_merge.htm	Sample mail merge letter with Donation Information
donationTotals_merge.htm	Sample mail merge letter with Donation Totals Information
receipts_merge_aus_dgr.htm	Sample mail merge mass mailing letter with Receipts Information for Australian Deductible Gift Recipient organizations
receipts_merge_aus_other.htm	Sample mail merge mass mailing letter with Receipts Information for Australian non-Deductible Gift Recipient organizations
receipts_merge_bilingual.htm	Sample mail merge mass mailing letter with Receipts Information for Canadian bilingual receipts
receipts_merge_canada.htm	Sample mail merge mass mailing letter with Receipts Information for Canadian English-only receipts
receipts_merge_french.htm	Sample mail merge mass mailing letter with Receipts Information for Canadian French-only receipts
receipts_merge_new_zealand.htm	Sample mail merge mass mailing letter with Receipts Information for New Zealand organizations
receipts_merge_other.htm	Sample mail merge mass mailing letter with Receipts Information for receipts for other countries for which there is not a more specific format
receipts_merge_usa.htm	Sample mail merge mass mailing letter with Receipts Information for receipts for the U.S.A.

The Backup subdirectory of the main [Data Directory](#) is the default initial directory for backups made with **Backup/Restore** ⇒ **Backup Database**. However, if you change that backup to be elsewhere, the location you used is memorized and used for the next backup or restore. (It is strongly recommended that you backup to a drive other than your local hard drive, such as a USB memory key or a writeable CD, in case your local hard drive dies!)

The Reports subdirectory of the main [Data Directory](#) is where any [memorized reports](#) from versions of DONATION prior to version 3.66 are stored. (Subsequent versions store them directly in the program's database.)

## 21.2 The Data Directory for the Program

Because DONATION does not need to be run as a Windows Administrator, and thus is not allowed to create or modify files under C:\Program Files (or C:\Program Files (x64) on 64-bit computers), all data files that are modified by the program must be stored elsewhere.

The directory (also called "folder") that was chosen to store all files that have to be modified is a subdirectory of your Windows All Users Documents directory, which unfortunately varies by the language of your system. For English-language systems, what we call the DONATION "Data Directory" is the following:

C:\Users\Public\Documents\Cooperstock Software\Donation

For the [OnDemand](#) Version, the data directory is always S:\Cooperstock Software\Donation, which is on the OnDemand server.

If for some reason you want to see what files are in that folder, you can do so with the **Tools** ⇒ **Explore Data Directory** menu option in the program, which brings up a Windows Explorer or Computer type window, showing the contents of that folder and its subfolders.

Please note though that this is **not** where the actual database file(s) live. They live in a folder underneath the Data Directory, named Data! It's also possible to move the database files to a completely different folder, though we don't recommend it, as long as that folder is on a drive physically connected to your computer (not a network drive that is actually attached to a different computer). See [Use the Database on a USB Memory Key](#) for one place you might want to move the database files to, and the instructions for (and warnings about) doing so.

There are other folders under the Data Directory as well. Please see [Files Used by the Program](#) to see which files are in the Data Directory and its subdirectories.

We should also mention that when we say that the Data Directory is C:\Users\Public\Documents\Cooperstock Software\Donation, there's a complication. The part of that path called "Documents" actually shows up as "Public Documents" if you drill down to C:\Users\Public and look at the folders under it in programs like Computer or Windows Explorer. That is a weird quirk of Windows, because if you look at in a Command Prompt window it does show up with its "real" name, "Documents". And any programming code must refer to that as "Documents" - if the code refers to it as "Public Documents", it won't be found!



## 22 DATABASE MAINTENANCE

### 22.1 Database Maintenance

[Validating Your Database](#)

[Copying Missing Donors](#)

[Copying Donor Addresses](#)

[Reassigning Envelope Numbers](#)

[Splitting Donors](#)

[Merging Duplicate Donors](#)

[Changing the Date of Donations](#)

[Deleting Old Data](#)

[Deleting All Data](#)

[Deleting the Latest Year's Data](#)

[Switching Databases](#)

### 22.2 Validating Your Database

The Firebird database software used by all versions of DONATION includes a feature for checking that the database is not damaged. This does not in any way check whether you have entered correct data. It is rather checking for the sort of damage to files that can happen if you turn off your computer while the program is in the middle of updating the database. (Obviously, we would strongly advise against doing that!) Such damage can also occur if your computer suddenly crashes while the program is in the middle of updating the database.

To validate your database, just run **Database** ⇒ **Validate**. When it is done, it will give the message "The database validation did not find any problems" if that was the case, and will display the errors if there are problems found. If any errors are found, please email the displayed errors to [technical support](#) for assistance.

Just to make sure users catch this very unusual problem if it occurs, DONATION actually prompts you and does this automatically once a month, as you are exiting the program. The only issue that can come up is for users of the [Local Network](#) Version or [OnDemand](#) Version who are allowed to have multiple simultaneous users, because the validation can only be done when there is only one current user of the program logged in.

There is probably no reason to run this option manually unless something very strange is happening. In that case, the program may not even start successfully, in which case you will not be able to run this option from the menu anyway! In that case, contact us for [technical support](#).

#### Easy Validation Problems Fix

There have only been ever been a handful of cases (out of thousands of users!) that we can recall where a user has informed us of a validation error in their Firebird database, so as you can see, this is a very rare problem. In those cases, it turned out that it was very easy to fix the problem. The user [restored](#) their latest backup database, checked the validation again, and it was fine.

If you do have a validation error, you could try the following steps:

- Be clear on where your most recent database backup is. (Call this "Backup A".)
- Make another backup, with **Backup/Restore** ⇒ **Backup Database**, being sure not to overwrite that previous backup. I.e. either store it in a different place, or with a different filename. (Call this "Backup B".)
- Restore Backup B, that you just made, with **Backup/Restore** ⇒ **Restore Database**.
- Check the validation, with **Database** ⇒ **Validate**. If it's OK now, you are done.
- If it's still not OK, and Backup A isn't too old (so you are willing to redo all data entry since that backup was made), restore Backup A with **Backup/Restore** ⇒ **Restore Database**.
- Check the validation, with **Database** ⇒ **Validate**. If it's OK now, you will just have to re-do any data entry since that backup was made.

You should probably also continue checking the validation periodically, to make sure whatever problem you originally had doesn't recur.

If the above steps didn't work, or Backup A was so old that you really didn't want to go back to it, please [contact technical support](#), and email Backup B to us as an attachment, so we can look at it and see whether we can fix it in some other ways. It is entirely likely that we will **not** be able to do this, though, so this is another reason to be sure to backup regularly!

## 22.3 Deleting Old Data

There are two ways to delete old data. One way is when you use **Maintenance** ⇒ **Change Year** to create a new year for the first time, and it copies the donors and categories to that new year. (This is part of the [Year End Procedures](#).) When it does that, you have the option to skip copying donors and categories that have no donations for the last 2 years. However, that is not really deleting anything, it is just choosing not to copy it to the next year.

To directly delete old data, use **Database** ⇒ **Delete Old Data**. This utility can delete data from the first year that you used DONATION for, up to 3 years prior to the current calendar year. So for instance, you run this option at any time in the year 2017, this can delete all years of data up to and including at most 2014. (For Canadian users, this reflects a Canada Revenue Agency policy that you must retain copies of receipts for two years from the end of a given receipting year.)

**Note:** It is up to you to determine, for your country, how far back you are allowed to delete old data. Even in Canada, if you have receipts for donations of property, they have to be kept for 10 years, although presumably the paper receipts would be sufficient.

When you select this menu option, a window comes up prompting you for the last year of data that you want to delete. Select that year, then click **OK**. After a couple of further questions to confirm you want to do this and that you have made a backup first, the data will be deleted for you.

The most obvious reason for doing this procedure is to keep your database file, and backups of your database file, from growing too large. However, there is no real reason from an efficiency standpoint to do this - the indexing of the database should ensure that all operations are very quick regardless of how many years of data you maintain in the program.

Because there is always the possibility that you will be audited, and that they will want donor and donation data from further back than you kept in the database, it is imperative that you

make a backup of your data before using this function, on an external medium like a USB memory key or writeable CD, and keep that backup copy permanently, so that you can restore it if you need to look things up in the old data after you delete it.

Using this feature does not actually make your database file smaller directly. In fact, it may even make your database larger initially, although it will mean that there is free space in it which can later be filled up with new data, so your database won't grow again for quite some time. If you do want to make your database smaller after using this feature, though, there is an easy way. Make a backup, with **Backup/Restore** ⇒ **Backup Database**, then immediately restore that backup with **Backup/Restore** ⇒ **Restore Database**. After that, the database file should be significantly smaller.

## 22.4 Deleting All Data

The menu option **Database** ⇒ **Delete All Data** deletes all data in your database, after confirming (twice) that this is what you want to do.

This option should almost never be used! However, here is one situation in which it might make sense to use it:

When you first start using the program, you could just enter some completely fake donors and donations, and issue real receipts for them (assuming you have a License Key, which is required to issue real receipts, or are using the free legacy [Lite version](#)). When you are finished testing or playing with this fake data, use this option to throw it all away, so that you can start over with your real data. You will then have to re-enter everything, starting with your Organization Info and donation categories.

Software4Nonprofits might also ask you to use this menu option in certain unusual technical support situations.

## 22.5 Deleting the Latest Year's Data

In unusual circumstances, you may find that you have created a new year's data with the **Maintenance** ⇒ **Change Year** [menu option](#), but you want to get rid of that year, so that you can recreate it later instead.

One example might be if you have created that year, not done any real work in it yet, then realize there are a number of address changes you need to make in the prior year, before you issue the receipts for that year. Because each year's donor records are separate, you would have to make those address changes twice for each donor, once in each of the years.

To delete the data from the latest year in the database, use the **Database** ⇒ **Delete Latest Year** menu option. The program will not allow you to use this option if there are any donations or receipts recorded for that latest year. (You wouldn't want to have to re-enter those donations, after all.)

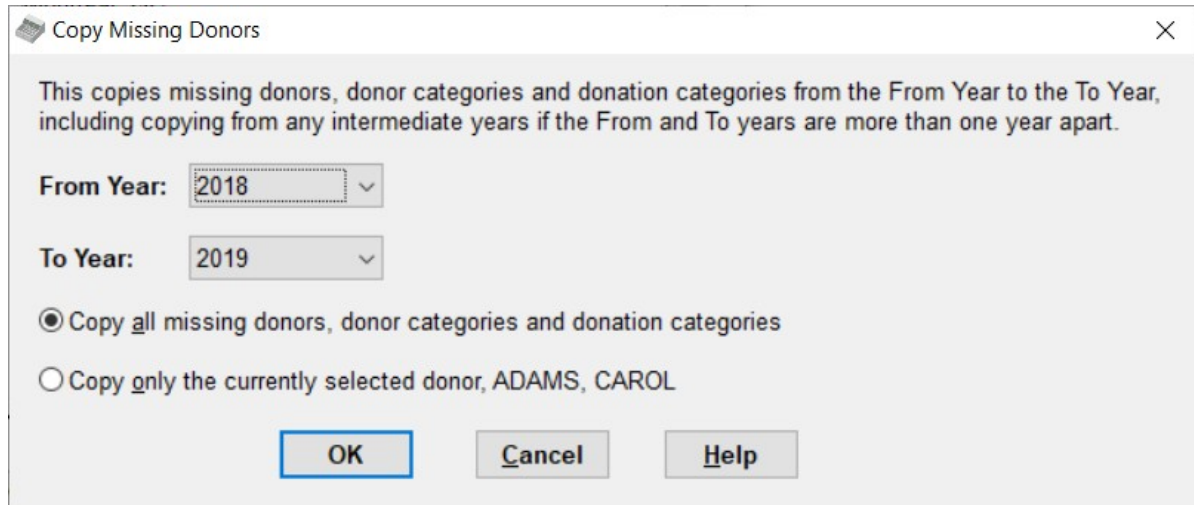
When you use this menu option, it will first confirm that you really want to delete that year's data. If you do, it will delete it. After that, if that year you just deleted was the current working year in the program, you will be switched back to the previous year.

## 22.6 Copying Missing Donors

The **Database** ⇒ **Copy Missing Donors** menu option allows you to copy all or one missing donors, donation categories, and donor categories from one specified year, and any intervening years, to another specified year.

### How to Use this Window

Choosing that menu option brings up the following window:



To use this window, select your desired From and To years from the drop-down lists of all years of data currently in the database. They can be one or more years apart.

Then you can choose between the two radio buttons, for copying all missing data (donors, donor categories and donation categories) or only the currently selected donor (and any donor categories it has) in the current year.

If you click on the 2nd radio button, "Copy only the currently selected donor ...", the From Year is automatically set to the current working year in the program, and becomes disabled so you cannot change it. If you see that the currently selected donor on the main window, and whose name is shown in the text of this radio button, is not the donor you want, just **Cancel** this window, select your desired donor, and come back to this window. If you aren't in the year from which you want to copy a given donor, change years first with the **Maintenance** ⇒ **Change Year** [menu option](#).

Then once you are happy with your selected years and the radio button choice, click **OK**, and follow the prompts. For most common uses the From Year will be less than the To Year, but you can also use it with the From Year greater than the To Year.

### Why you Might Need This Window

When you first start working on a new year by using the **Maintenance** ⇒ **Change Year** [menu option](#), it copies all donors and categories from the current year to the new year you have selected. It also optionally skips copying donors that have not donated in the last 2 years,

which you may later decide was a mistake. Also, subsequent times that you switch to that year, it does not copy any further donors or categories.

So, suppose you've been working on 2019, and on January 1, 2020, you switch to 2020 for the first time. All donors and categories from 2019 (that you have entered so far!) will be copied to 2020. Now, suppose you notice a few late donations that you still need to enter for 2019, and they are for new donors. You switch back to 2019, and enter those donations and donors. Then, switch back to 2020. The new donors aren't in 2020! That's what this feature is most commonly used for, to copy those missing donors, in this example from 2019 to 2020. In this case, when you were in the 2020 year, you would use **Database ⇒ Copy Missing Donors**, using the From Year 2019 and To Year 2020 to fix things up.

Of course, it is possible to just re-enter the missing donors manually. This is a bad idea for two reasons. First, it's extra typing, and error-prone! More importantly, if you enter a donor manually in two different years, and then do a report that compares donations between the two years by donor (such as. **Reports ⇒ Donor ⇒ Donation Info ⇒ Sort by Name** or any of the other reports on that [sub-menu](#)), it won't correctly match up the donations for that donor for the two years.

Another situation where missing donors can be an issue to also related to changing the year for the first time. When you do that, and it prepares to copy from the previous year, it asks you whether to skip copying donors that don't have donations within the last two years. If you answer Yes to that (a reasonable choice), some donors will be skipped. If you later do get some donations from those donors, you would want to bring those donors forward by using this new option. (Of course, doing so makes it as if you answered No to that question.) For individual donors where this comes up, it would make sense to choose the "Copy only the currently selected donor ..." radio button to fix this, after switching back to the previous year and selecting that donor.

A similar case for using the "Copy only the currently selected donor ..." radio button would be if you had copied all of the donors from one year to another, then you believed a given donor would no longer be donating in the new year so you deleted them there . Then you do get another donation from them in the new year!

#### When is a Donor "the Same" Between Two Years?

It's important to understand what the program's definition is of a "missing" donor or category. Contrary to what you might expect, it is not based on the name of the donor or the Member/Envelope # for donors, or the name of the category for categories! Basing it on such data would be too error prone. You might have entered the same person in two different years with slightly different spellings, or you might genuinely have two different John Smiths, or you might have assigned the same Member/Envelope # to a different donor in a different year. So using any of those fields would cause errors if those were the elements linking donors.

Rather, the rule really is that if a donor or category didn't get into a given year (either the one you're copying from, or the one you're copying to) by being copied in the first place by the program, it is considered to be missing. ("Copied by the program" includes being copied by the **Change Year routines**, or by the **Copy Missing Data** routine.) This has some interesting side-effects, however. Suppose you did hand-enter a new donor record for John Smith in two different years. If you then use this routine, you will end up with two copies of John Smith in the year you are copying to!

It's also important to understand that the program only copies entire missing donors. It does not update changed addresses or other information for existing donors! Addresses that have been updated in one year and are needed to be correct in another year can be fixed with the **Database** ⇒ **Copy Addresses** [menu option](#). Other changes that you need in multiple years after copying to a new year has been completed must be done by hand, if it is important to you that previous year's records for the donors also have the same changes.

If you use **Copy Missing Donors** and then find that you have duplicate donors in one of the years, because you had already re-created the same donor manually in the year you were copying to, you can use the **Database** ⇒ **Merge Duplicate Donors** menu [option](#) to fix that, by deleting the duplicate.

The program also watches out for this process creating duplicate Member/Envelope Numbers, which isn't supposed to be allowed, and tells you how to find them and fix them if they are found.

### Copying Between Multiple Years

**Copying Forward:** If your From year is more than one year **before** the To year, DONATION will copy from the most recent data first.

So for instance if you copy From 2018 To 2020, the sequence of copies will be:

1. Copy missing donors etc. from 2019 to 2020
2. Copy any remaining missing donors etc. from 2018 to 2020

There is never any copying done to years in between the From and To Years.

Note: In releases prior to 4.14, the copying forward was done in the opposite order, first from the From year to the To year, then moving forward, which we realized was not ideal because it tended to get out of date data into the To year.

**Copying Backward:** If your From year is more than one year **after** the To year, DONATION will again copy from the most recent data first. So for instance if you copy From 2020 To 2018, the sequence of copies will be:

3. Copy missing donors etc. from 2020 to 2018
4. Copy any remaining missing donors etc. from 2019 to 2018

There is never any copying done to years in between the From and To Years. (Copying in this backward direction is not frequently needed!)

### Multi-Year Reports and Copying Missing Donors

Prior to version 3.42 of DONATION, all of the multi-year reports on the **Reports** ⇒ **Donor** ⇒ **Donation Info** [sub-menu](#) had a weakness, in that they only showed donors that were present in the current year. So if there was a donor with donations in the prior year(s) that had not been copied to the current year, it would not show up on any of those reports, and thus the total donations figures for the prior year(s) at the bottom of the report would not actually be correct. (The same weakness applied to **Reports** ⇒ **Donor** ⇒ **Old Donors** - it only showed donors present in the current year, who had not donated in the past 2 years, but had in prior years.)



This weakness was another reason for using **Database ⇒ Copy Missing Donors**, to make those reports complete.

Starting in version 3.42, however, all of those reports have been fixed to include all donors in all relevant prior years, whether or not they have been copied to the current year. (The relevant prior years are the current and previous year for all but one of the reports mentioned above, and the current and prior three years for **Reports ⇒ Donor ⇒ Donation Info ⇒ Last 4 Years**. As a result, their totals for all years will now be correct, and **Database ⇒ Copy Missing Donors** is no longer required to fix them.

**However**, this is not the case when you do multi-year report, for over 2 years, with the **Reports ⇒ Custom Reports** [menu option](#). While a report for 2 years will automatically include any donors in the earlier year which are missing in the later year, reports for over 2 years only include donors that are present in the last of those years. If you want to be sure to have all donors in all of those years included (including ones you might have deleted in later years), you could first use **Copy Missing Donors** to copy all of the donors forward from the first of the years, and all intervening years, to the last of those years. In fact, the program will prompt you about whether you wish to do that, if there are missing donors in the last year, when you run such reports, and if you answer Yes, it will do so automatically without you having to go to that menu option.

#### Pledges and Copying Missing Donors

If you use pledges, there are some further details you should understand about what happens when you copy missing donors.

What happens exactly depends on what you have selected in the Pledges tab of the **Maintenance ⇒ Main Window Options** [window](#). (Note: If you have turned off the display of the Annual Pledge field on the Donor Details tab of that window, no pledge information will be copied, because the assumption is that you aren't using pledges.)

If you select the pledging type "Simple Annual Pledge", you will be asked whether or not to copy the Annual Pledge amounts.

If you select the type "Annual with Start Date and Category", you will be asked whether or not to copy the pledge data. If you answer Yes, pledge start dates in the donor records copied to the other year will be set to be January 1st of that other year.

If you select the type "Multi-Year", no question will be asked. Any multi-year pledges whose range of years includes the year that you are copying to will be copied over, with exactly the same details as they had in the year you are copying from.

#### Cleaning up after a Temporary Copy Missing Donors

Suppose you do a **Copy Missing Donors** from a few years back, to the current year, in order to do some specific reporting, like a list of the addresses or donations for all donors in the last 5 years. But after that, you don't want your current year's database cluttered up with many donors from past years who have never donated.

You could use **Reports ⇒ Donor ⇒ Non Donors** in that case to find all donors in the current year's list that have never donated, with the number of years each one has been in your



current database, and then consider manually deleting ones that have been around for a while and never donated, or that you know have died, lost interest in your organization, or whatever.

Another helpful report for this purpose is **Reports ⇒ Donor ⇒ Old Donors**, which lists donors that are present in this year or last year's list of donors that have not donated in either year, but did donate in previous years, with the date of their last donation and the total amount they have ever given.

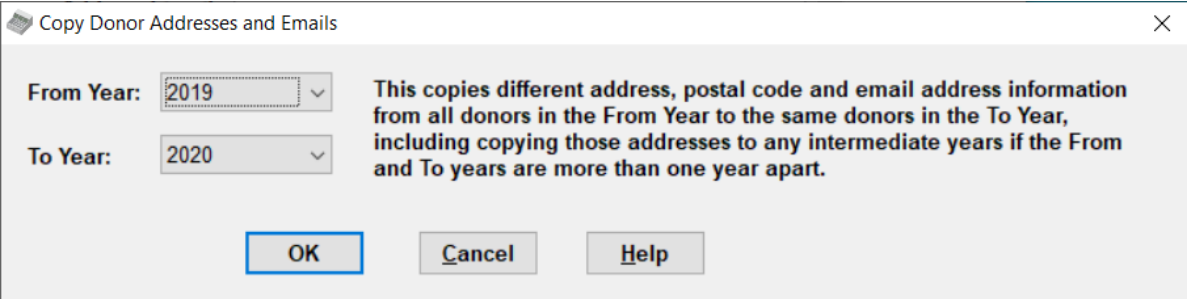
Yet another option is to make a database backup before the copying, do the copying and any needed reporting (but no other data entry!), then carefully restore that database backup you made.

## 22.7 Copying Donor Addresses

The **Database ⇒ Copy Addresses** menu option allows you to copy all donors' postal and email addresses from one specified year to any other specified year, and also to any intervening years. This can be required because once you have multiple years of data in the program, there are separate copies of the donor records in each year. What is copied is the three Address fields, the Postal Code field, and the Email Address field.

### How to Use this Window

Choosing that menu option bring up a window such as the following:



To use it, select your desired From and To years from the drop-down lists of all years of data currently in the database. They can be one or more years apart. Then click OK, and follow the prompts. It defaults to showing the To Year as your current working year and the From Year as the year before that, but you can make any desired changes, including using it with the From Year greater than the To Year.

Before doing the copying, the program will give you an option to make a database backup. Assuming you do that, if you review the changes right after the copying and decide you did something wrong (like copy in the wrong direction!) you can immediately restore that database backup, with **Backup/Restore ⇒ Restore Database**, to get back to where you were before the copying.

It is important to understand that the program does not keep track of what data has been changed, and when. So it cannot know which donors had changes to their addresses or emails, in which years. When you do this copying, it copies every single donor's address and email in the From Year to the same donor in the other year(s) you have selected, if there is any difference in any of the fields. (And that would be even if the most recent change to a

donor's address was made in the To Year - it will still be replaced with the current address listed in the From Year.)

Also, if one of the fields in the year you are copying **from** is empty, that same field will be cleared in the year(s) you are copying to, even if that same field is filled in there!

If the From Year and To Year are more than one year apart, the addresses and emails in the From Year are copied to the same donors' records in **each** of the years between it and the To Year, including the To Year.

#### Why you Might Need This Window

When you first start working on a new year by using the **Maintenance = Change Year** [menu option](#), it copies all donors and categories from the current year to the new year you have selected. After that, any changes you make to the donors' details, including their addresses or emails, are only made in the year that you are working on.

So, suppose you've been working on 2019, and on January 1, 2020, you switch to 2020 for the first time. All donors (and categories) from 2019 will be copied to 2020. Now, suppose you find out about some address or email corrections that you need to make before sending out the 2019 tax receipts.

There are then two main cases:

**Case 1:** You switch back to 2019, and make those corrections. In that case, the corrections will only be present in 2019, not 2020. You will want to run this window with the From Year being 2019 and the To Year being 2020, to bring the addresses and emails for the same donors forward.

**Case 2:** You made the changes in the 2020 data, but need them to be in 2019 for the receipts. In that case, you will want to run this window with the From Year being 2020 and the To Year being 2019.

**Case 3:** You made some of the changes in the 2019 data (after already having opened 2020) and some of the changes in the 2020 data. In that case there would be no good direction in which you could use this window, because either direction would lose some of your changes!

You might also occasionally find yourself needing to reprint a receipt from 2 or more years back, and want to make sure that the current address you have on file for the donor is printed on that receipt. (In Canada, this is required by the Canada Revenue Agency.) If you were going to email the receipt, you would also want to make sure their current email address was used. Of course, you could just manually update that one donor's address and email after switching back to the desired year in which you need to reprint the receipt. Or you could use this window, with the From Year being the current year and the To Year being the year for which you need to reprint the receipt, which will update **all** donors' addresses and emails.

#### When is a Donor "the Same" Between Two Years?

It's important to understand what the program's definition is of a donor being the same between two years. Contrary to what you might expect, it is not based on the name of the donor or any other data you can see like their email address! Basing it on names would be too error prone. You might have entered the same person in two different years with slightly

different spellings, or you might genuinely have two different John Smiths. Both of those would cause errors if it was done by name.

Rather, the rule really is that if a donor didn't get into a given year (either the one you're copying from, or the one you're copying to) by being copied in the first place by the program, it is considered to be a different donor. ("Copied by the program" includes being copied by the **Change Year** [routines](#), or by the **Copy Missing Data** [routine](#).) As a result of this, if you do hand-enter a copy of a missing donor from one year in a different year, this copying addresses and emails routine will not work for them, because the program doesn't know it is supposed to be the same donor.

## 22.8 Reassigning Envelope Numbers

Some churches that use envelope numbers like to reassign / renumber them annually or periodically. The **Database** ⇒ **Reassign Envelope Numbers** menu option can be used for this purpose. This would often be used on a new year's donors, after using the **Maintenance** ⇒ **Change Year** [menu option](#) to create a new year.

You can also assign the next higher envelope number after all existing ones, or the lowest unused envelope number, to an individual donor. See [here](#) for details.

After selecting the **Database** ⇒ **Reassign Envelope Numbers** menu option, the Reassign Envelope Numbers window appears, as follows:

On this, you have to make two choices and one entry:

1. **Give new numbers to:** This is one of "All current non-business donors", "Only donors who already have an envelope #", or "All donors".

"All current non-business donors": This option gives a new envelope number to every donor

in your database, except for businesses (because presumably they don't attend church and make weekly donations with envelopes!). If any businesses do have envelope numbers, those numbers are removed. Businesses are considered to be those donors whose Business Name is filled in.

"Only donors who already have an envelope #": This option only renumbers the envelope numbers of all donors that currently have envelope numbers. If you currently have donors with envelope numbers that you want to be excluded, so that they don't get envelope numbers, you will need to manually remove them by editing those donors first to remove the contents of the Member/Envelope # field, and then use this option.

"All donors": This option gives a new envelope number to every single donor, whether or not they are a business, and whether or not they already have an envelope number.

2. **Order to assign the numbers in:** You can select either "Alphabetical by last name and first name" or "Random order".
3. **Starting Env. # for assignment:** This is where to start the renumbering at. This will be initialized to be the same as the "Lowest Member/Env. # for automatic assignment" option on the Donor tab of the **Maintenance ⇒ Main Window Options** [window](#), and in fact changing the number here also changes it on the **Main Window Options** window.

Once you have made these selections, click the **Reassign** button.

The program will then first confirm that you have made a backup of your database recently. This is important, in case you do the reassignment, and then decide it was not what you wanted, or you did it on the wrong year's data, or something. If you have made a backup, do the renumber, and aren't satisfied with the results, just restore that backup (with **Backup/Restore ⇒ Restore Database**) to be back to where you were before the backup.

The program then asks you to confirm that that this is what you want to do, telling you how many donor's envelope numbers will be affected. When it is done, it tells you whether or not it was successful.

Progress on the updating of the database is shown on the progress bar at the bottom of the window.

### Tips and Tricks

Probably the easiest way to use this option is either near the year end, or shortly into a new year, after you have used **Maintenance ⇒ Change Year** to move into the new year's data for the first time. When you use this option, only the donor's envelope numbers for the year you are working in are changed. If you change back to the previous year with **Maintenance ⇒ Change Year**, the donors in that year will still have their old envelope numbers. It is not a problem for the same donor to have different envelope numbers in different years.

If you need to do the renumbering for the coming year a month or two before the year end, because you need to re-order new envelopes and want to know how many you will need, you can first switch to the next year, do the Reassignment, review the results, then switch back to the current year. When you pass the year end and are ready to start entering donations for the new year, you should use the **Database ⇒ Copy Missing Data** [option](#) to copy any donors

added during those last couple of months from the current year's donor list to the new year's donor list. However, that only copies (as it says) missing donors - any address changes etc. will have to be re-done manually in the year in which they were not originally done.

**Warning re: Reassigning Envelope Numbers and Importing Donations**

If you are using the **Database ⇒ Import ⇒ Donations** [menu option](#) to regularly import recurring donations, they are matched to the correct donor by the envelope number, which is in the first column of the file you import. If you have reassigned your envelope numbers, you need to edit that file to give the new correct numbers to each donor in that file!

The same would apply if you are using the **Database ⇒ Import ⇒ PAR Donations** [menu option](#), because those are also matched by envelope number. In that case, you would have to inform PAR of the new envelope numbers for the donors, so that they can make those corrections before sending you the next data file for importing.

## 22.9 Splitting Donors

The **Database ⇒ Split Donor** menu option can be used to create a duplicate of the current donor, which you can then edit to be slightly different.

This might be used to split a donor record that has both spouses' names in it into two separate records for the spouses, or to add a new record for a child in a family. Any donation records associated with the original donor are left with that donor - the new donor record will not have any donation records.

## 22.10 Merging Duplicate Donors

The **Database ⇒ Merge Duplicate Donors** menu option brings up the Merge Duplicate Donors window.

Selecting that menu option brings up a window such as the following:

Merge Duplicate Donors

Please select two donors to merge, from the list at the left, by clicking on them.

Selected Donor	# of Years of Data	Keep This One?
		<input checked="" type="radio"/>
		<input type="radio"/>

☐ Only Merge them in the Current Working Year

Merge Help Close

The purpose of this window is to allow you to merge pairs of donors. The effect is to move all donations and receipts from one of the donors to the other one, and then delete the first of those donors (whose donations and receipts were moved).

When there are multiple years of data for these donors in your database, the program tries to merge the donations and receipts in all of those years, except in two cases:

1. if you check the **Only Merge them in the Current Working Year** checkbox, or
2. in certain problem cases when you don't check that, which it will advise you about, where it can only do so for the current year.

To understand why there are copies of the same donor in multiple years in the database, if you have been using it for more than one year, please see [Changing Years in the Database](#).

There are a few cases in which merging donors might be required.

First, you might have entered two separate Donor records for spouses, and then realized that they would prefer to receive joint receipts. As a result, only one Donor record, with both of their names in it, is really required. Or, you might have accidentally entered the same donor twice manually, and entered donations for both of those duplicate donor records.

The other situation is more complex, and involves the use of the [Copy Missing Donors](#) option, when you have multiple years of data in the program. There are various situations where this could come up, but here is one of them. Suppose you use the **Maintenance ⇒ Change Year menu option** to copy the donors from one year to the next, at the year end. Then, you realize that you missed entering a donor in the earlier year, so you enter them as a new donor. Then,

you think, whoops, they don't exist in the new year either, so you create them there as well as a new donor.

The problem with this is that those two donors aren't connected. If you do year-versus-year reports such as **Reports** ⇒ **Donor** ⇒ **Donation Info** ⇒ **Sort by Name**, only the current year's donations for that donor will show up. To fix that, you have to use the Copy Missing Donors option, which creates a properly linked donor in one year, based on the donor in the other year. But now, you have two copies of that donor in the year that you copied to!

If you need to find the duplicate donors, **Reports** ⇒ **Donor** ⇒ **Potential Duplicates** can help identify them (though it also finds donors who just have similar names). **Reports** ⇒ **Donor** ⇒ **Actual Duplicates** is also useful - it shows only pairs of donors with identical names (possibly with different capitalization).

In the Merge Duplicate Donors window, there is a list of all of your donors on the left. Click on two donors that are the duplicates (or spouses) that you want to merge. As you click on them, they will appear in fields on the right. If you have made an incorrect choice, click on that choice in the list on the left again to unselect it, then select a different one.

Along with the donor's name on the right, there is a field for "# of Years of Data". That tells you in how many different years this donor appears. Donors that have been copied properly, by the normal year-end process in **Maintenance** ⇒ **Change Year** or by **Database** ⇒ **Copy Missing Donors**, will have a value of 2 or higher for # of Years of Data. Donors that have just been created in one year and never copied will have a value of 1.

There are also two radio buttons to the right of the two selected names and their # of Years of Data, with the heading "Keep this One?". You need to select the radio button for the one that you want to keep, which should be the one with more years of data. If they both have only one year of data, or both have more than one year, you can pick either one, as you wish.

Finally, as mentioned above, you can check the **Only Merge them in the Current Working Year** checkbox, if that's what you want to do, as opposed to doing it in all years in which the donors have data. If you do **not** check the checkbox, the donations and receipts will be moved from one donor to another, and one of the donors will be deleted, in every year in the database in which those donors both exist.

When you have the selections the way you want them, click the **Merge** button. After a confirmation, it will do the merge, and inform you of whether it was successful. As mentioned above, it will move any donations and receipts for the donor you aren't keeping to the donor you are keeping, for one or all years of data, and will then delete the donor you aren't keeping. Please note that this action cannot be undone, other than by restoring a backup of your database.

After this, if you have more duplicate donors to merge, you can continue doing so on this window.

When you are finished with this window, click **Close**.



## 22.11 Merging Duplicate Donation Categories

The **Database** ⇒ **Merge Duplicate Donation Categories** menu option brings up the Merge Duplicate Donation Categories window.

Selecting that menu option brings up a window such as the following:

Selected Category	Receiptable?	Keep This One?
<input type="text"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
<input type="text"/>	<input type="checkbox"/>	<input type="radio"/>

The purpose of this window is to allow you to merge pairs of donation categories. The effect is to change all donations using one of the categories to the other one, and then delete the first of those categories (the donations for which were changed).

Changes made by this window only affect the current working year's categories and donations.

If the one you want to merge into another one has no donations in the current year, instead of using this window, you could instead just delete it in the **Maintenance** ⇒ **Donation Categories** [window](#). But this window can still also be used in that case.

There are a couple of fairly obvious cases in which merging donation categories might be required:

First, your list of categories might have grown over time, perhaps being edited by multiple people, and you realize that two of them really have the same meaning.

Or, you might be [importing donations](#) from a file, and new category names are imported from it that really are the same as existing categories in your database.

In the Merge Duplicate Donation Categories window, there is a list of all of your donation categories on the left. Click on two categories that are the duplicates (or at least have the same meaning) that you want to merge. As you click on them, they will appear in fields on the right. If you have made an incorrect choice, click on that choice in the list on the left again to unselect it, then select a different one.

Along with the category name on the right, there is a field for "Receiptable". That tells you whether or not donations using the category are receiptable. (See [Non-Receiptable Donors and Donations](#) for more details.) Depending on the receiptable status of the two categories you pick here, it may or may not be possible to do this merging.

There are also two radio buttons to the right of the two selected names and their Receiptable status, with the heading "Keep this One?". You need to select the radio button for the one that you want to keep, which should be the one with the more standard or obvious name.

When you have the selections the way you want them, click the **Merge** button. After a confirmation, it will do the merge, and inform you of whether it was successful. As mentioned above, it will change the category of any donations using the one you aren't keeping to the category you are keeping, and will then delete the category you aren't keeping. Please note that this action cannot be undone, other than by restoring a backup of your database.

If you realize after doing the merge that you clicked **Keep this One** for the wrong one (and didn't notice that from the confirmation message), it's easy to fix. Just go to the **Maintenance ⇒ Donation Categories** [window](#), and edit the name of the newly-merged category to be your desired name.

After this, if you have more duplicate donation categories to merge, you can continue doing so on this window.

When you are finished with this window, click **Close**.

## 22.12 Switching Databases

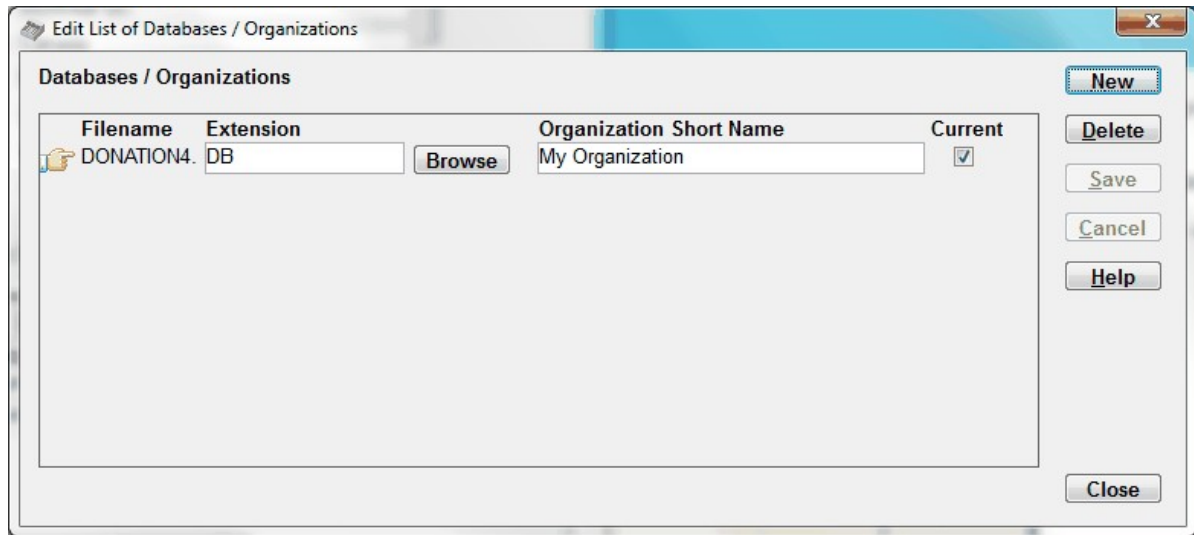
You can maintain multiple databases for multiple charitable organizations on your machine. To do this, use the **Database ⇒ Switch Databases** option. You can have any number of databases, but the section on [Software Licensing](#) below explains that you have to pay at a higher rate if you have more than five.

It is **not** recommended to use this to create separate databases for separate fundraising efforts or sub-committees etc. within your same charitable organization - just use multiple [donation categories](#) for that, all in one database! [Contact us](#) if you need a fuller explanation of why this is generally not a good idea.

**Note:** This option of multiple databases is not available with the free [Lite version](#) of DONATION, or with the Standard version if you are using it for free for up to 50 donors with donations. These versions can only maintain one database on each computer on which it is installed.

Also, users with the [Local Network Client](#) version installed on their computer cannot use the **New** button in the window below to create additional databases - only users on the computer with the Local Network Server Version can do that. See a [section below](#) for further details.

This option brings up the following window that lists all of your organizations:



There are three editable columns of information. The first is the Extension, which is the ending of the filename for the database. All database filenames start with "DONATION4.", and live in the Data subdirectory of the program's [Data Directory](#). Your standard database is called DONATION4.DB, so you will see "DB" in the Extension field when you use this window for the first time.

The 2nd column of information is the Organization Short Name. This may be the same as the full Organization Name entered in **Maintenance** ⇒ **Organization Info**, or may be a shortened version of it. (It holds a maximum of 40 characters). It is only used in this window, to help you remember which database is which when you are switching between them.

The 3rd column is a checkbox labelled "Current". Whichever line has a check mark in this checkbox is the current database. To switch databases (once you have more than one database on the list), just check the Current checkbox on your desired database, then click **Close** or **Switch** at the bottom right of this window. (The **Close** button changes to say **Switch** as soon as you check the Current database for a database other than the one you are currently in.) The program will ask you to confirm that you wish to switch to that database, and if you answer Yes, DONATION will be restarted with the new database open.

To create an additional new empty database for an additional organization, click the **New** button, and on the new row that appears, fill in an Extension (which should not contain spaces, and must be different from the extensions for all of the other databases on your list) and an Organization Short Name. You can make up any Extension you want, as long as each database's extension is different! Click **Save** to save your change. As usual, you can click **Cancel** to cancel the addition of the new database. After you click **Save**, it will ask whether you want to create a new database by copying from an empty database. In most cases, you would answer Yes to this question. If you then want to switch to this database, check its Current checkbox, and click **Switch**.

Alternatively, if you have an existing additional database file, perhaps from another computer, that you have already copied into the Data subdirectory of the program's [Data Directory](#), you can click **New**, leave the Extension field blank, and then click the **Browse** button to select that database from the list of databases in that directory. If you have selected a valid

database, its extension will then be filled into the Extension field, and you can continue from there. *The **Browse** button is not normally used when you are creating additional databases!*

When you switch to a new database for the first time, a version of the [Startup Options](#) windows will appear, allowing you to select between initializing the database normally, or restoring a backup of that database. The latter would be appropriate, for instance, if you were moving an installation of DONATION that had additional databases from one computer to another.

You can also change the Extension or Organization Sort Name of an existing database by just editing the data then clicking **Save**. Be very cautious about changing the Extension of an existing database, however, as it does not rename the file for you. In most cases this will mean that you will lose access to that database, and just have to change the Extension back to its correct value. (Or, you can rename the database file yourself, using Computer, My Computer or Windows Explorer.)

If you wish to remove a database from the list, click anywhere in its row (so that the pointing hand points to it) and click the **Delete** button. This will confirm that you want to delete the row, then do so. It does not delete the database file. If you wish to actually delete the database file, first be sure you have noted the Extension of the one you wanted to delete. You can then get to the program's [Data Directory](#) with the **Tools** ⇒ **Explore Data Directory** menu option, then drill down into the Data subdirectory under that, then **very carefully** delete only the file whose name starts with "DONATION4." and ends with the Extension of the one you don't want anymore.

When you are done in this window, make sure you have the Current checkbox checked for the database you wish to resume working on, and click **Close** or **Switch** to close the window. As mentioned, if you have changed which one is Current it will confirm that you want to switch to it, then do so. The Organization Name is now displayed in the title bar of the DONATION program's main window, so you can easily see which organization's database you are using. (Note: what is displayed is the Organization Name from **Maintenance** ⇒ **Organization Info**, not the Organization Short Name from this Switch Databases window.)

If you have databases from very early versions of DONATION (mid-2007 or earlier) or from various other programs that DONATION can convert from on your computer, there is one thing to be aware of when creating new databases and switching to them. The first time you switch to a database, if you had a database with that same extension in the earlier version or DONATION, or any database from a program that DONATION can convert from, it will give you the same prompt it gave you when you started DONATION for the first time. That is, it will ask whether you wish to convert the database from your earlier version of DONATION or that other program into this new empty database. You can decide what the appropriate answer to that question is, depending on whether you want to do that conversion, or start with an empty database.

### Backups and Switching Databases

It is important to understand that when you [backup](#) your database, with **Backup/Restore** ⇒ **Backup Database** or **Backup/Restore** ⇒ **Email Backup**, only the current database that you are in is backed-up. If you also want to have backups of your other database(s), you must switch to them and back them up as well.

### Memorized Reports, Mail Merge Letters and Receipts, and Switching Databases

Starting in version 3.66 of DONATION, both [memorized reports](#) and [mail merge](#) letters and receipts are stored in the database. Previously they used to be stored in separate files in subdirectories under the [data directory](#) of the program. One implication of this change is that whereas all such files used to be shared by all of your databases, they are now specific to each database. In some cases this will be exactly what you want, while in other cases you will want to share them between multiple databases.

If you want the same memorized report to be present in more than one database, you will have to create and memorize it in each of the databases.

If you want a mail merge letter or receipt, which you have already created and edited in one database, to be present in another database, do as follows. After switching to the other database you can go into the **Letters** ⇒ **One Letter window**, click the "Show Advanced Actions" checkbox in that window, then use the **Browse and Edit** button to select the desired template letter file and load it into that database.

#### Note on Software Licensing and Switching Databases

The [software licensing](#) in DONATION is associated with your Organization Name. When you use **Database** ⇒ **Switch Databases** to create or switch to additional databases for other organizations, you may no longer be licensed, and DONATION will temporarily go back to being an Evaluation version (but only for that new organization). You will have to request another license key for the new organization name. To make this request immediately, you can either exit and restart DONATION, which will bring up the Evaluation and Licensing window, or use **Tools** ⇒ **Request or Install License Key** which will also bring it up.

There is normally no additional charge for maintaining databases for more than one organization on the same computer. So as long as you have paid for DONATION in the last 12 months, license keys for additional databases will be freely granted, at no additional charge. The only exception is if you have more than 5 different databases, in which case we will ask you to pay to upgrade to the Local Network Version. You don't have to actually switch to and use that version - it is just a convenient higher price that we charge to account for our additional administrative time giving multiple license keys, and the additional value you derive from being able to use DONATION for so many organizations.

Users who are still in their initial evaluation period do not have or need license keys, so this is not an issue until you purchase the program, at which point you will need to request license keys for each of your databases.

#### Use on Multiple Computers and Switching Databases

If you are using the program on multiple computers through one of the options in the Help topic [Multiple User Options](#) other than using the [Local Network Version](#) (which has a separate explanation below) the users on the other computer will also have to create the same additional database(s) through this window, with the same extension(s). When they then switch to that database, they can restore a backup of that database from the computer it was first created on, sent in one of the ways described in the Help topic [Transfer your Data between Computers](#).

#### Local Network Versions and Switching Databases

If you are using the [Local Network](#) versions of DONATION, only the Local Network Server Version can create new databases. In the Local Network Client Version, the **New** button and several other buttons are greyed out (disabled) so you cannot use them. Once the Local Network Server Version has created a new database, users of the Local Network Client Version can also access and switch between those new databases.

Until version 3.61 of DONATION, for users of the Local Network Client Version to get access to those databases, you needed to manually copy the file named databases.txt from the program's [Data Directory](#) on the computer with the Local Network Server Version to the Data Directory of any computers with the Local Network Client Version, after making any changes in this window. Starting with version 3.61, that is no longer the case - changes made on the Local Network Server Version are now automatically picked up by the Local Network Client Version. (If you are reading this paragraph, you have at least that version!)

### Passwords and Multiple Databases

Any [passwords](#) that you set up or use in the program are only for your current database. Each database can have its own passwords.

### Starting with a Specific Database

For users who feel confident to do so, you can edit the Desktop icon for DONATION to start on a specific database.

To do so, right-click on that icon and pick "Properties" from the popup menu. In the field for Target on the window that comes up, add a space at the end of what is there, and then after that space add "/E ext", where you replace *ext* with the desired database extension, e.g. "/E DB" for the standard original database.

If you want to have different icons to start DONATION for different databases, you can right click on the same icon and pick Copy from the popup menu, then right-click in any blank space on your desktop and pick Paste from the popup menu. That will create a 2nd DONATION icon. Then edit that 2nd icon to use a different database extension. You will also want to right-click on each of your icons and pick Rename, to rename them to be clear which is going to which database.

When you start DONATION with the "/E ext" command-line option, it will remember that for the next time you run DONATION (e.g. even if you omit that option), as if you had switched to that database with the **Database** ⇒ **Switch Databases** menu option.

## 22.13 Viewing and Exporting Data with SQL Selects

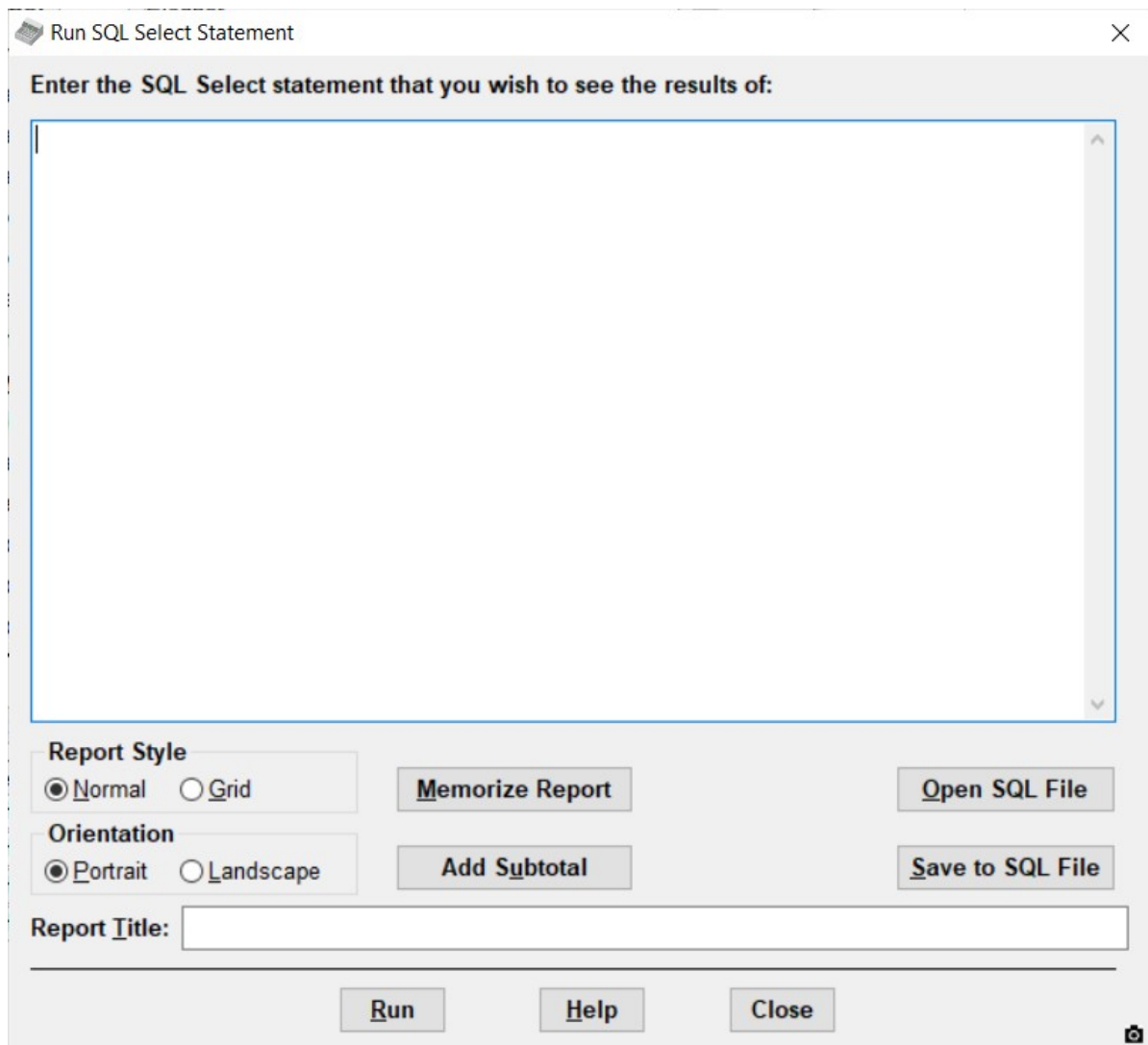
SQL stands for Structured Query Language. It is the basic programming language used by the Firebird database that stores the data in DONATION, and by almost all major database systems today, such as Microsoft or Sybase SQL Server or Oracle. Some very technically experienced users of the program may be familiar with SQL, and may wish to explore the database using it. That is what the **Database** ⇒ **SQL Select** feature allows you to do. We may also give you some instructions to use this feature either to help debug problems you are having, or to create simple ad-hoc reports that are not included in the **Reports** menu and that cannot be created with **Reports** ⇒ **Custom Report**.

While this SQL Select utility can be used to create custom reports, most users will prefer to use the much easier (though less powerful) **Reports** ⇒ **Custom Reports** [option](#), which does



not require any knowledge of SQL. With that option, you just select columns from lists, specify a range of years, and click OK. It generates the SQL for the report automatically, and then optionally puts you into this SQL Select window.

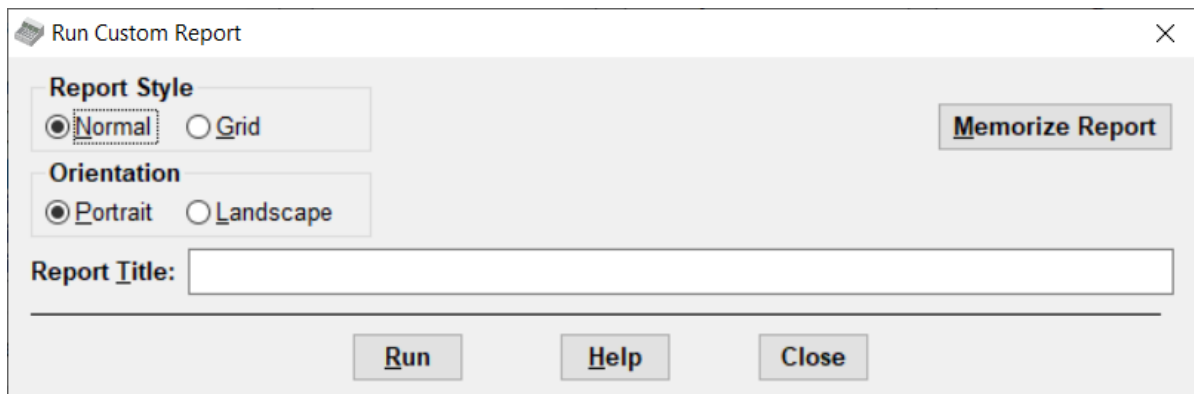
When you select **Database** ⇒ **SQL Select** (or come to here after clicking **OK** in the Custom Reports window), the following window comes up on which you can enter a SQL Select statement:



The image shows a dialog box titled "Run SQL Select Statement" with a close button (X) in the top right corner. Inside the dialog, there is a text area with the prompt "Enter the SQL Select statement that you wish to see the results of:". Below the text area, there are two sections: "Report Style" with radio buttons for "Normal" (selected) and "Grid", and "Orientation" with radio buttons for "Portrait" (selected) and "Landscape". To the right of these sections are four buttons: "Memorize Report", "Open SQL File", "Add Subtotal", and "Save to SQL File". At the bottom left, there is a "Report Title:" label followed by a text input field. At the bottom center, there are three buttons: "Run", "Help", and "Close". A small camera icon is in the bottom right corner.

If you have come into here from **Reports** ⇒ **Custom Report**, the SQL statement will already be filled in to the large entry box in the window. However, if you checked the **Hide SQL Text on Next Window** button the Custom Reports window, you will instead see the following simpler window, that does not show the actual SQL, in order to be less confusing:





If the full window is displayed instead of the smaller one, you can save a SQL statement that you enter here (or that was created by a Custom Report) to a file with the **Save to SQL File** button, or retrieve an existing SQL statement from a file with the **Open SQL File** button, to re-use it. However, more commonly you would instead use the **Memorize Report** button - more details on that are below.

On this window you can select a Report Style – either **Normal** or **Grid**.

The Normal style looks a lot like the built-in reports. The advantages to using the default Normal Report Style are that it has a standard header section, like the built-in reports, and it starts out in Print Preview mode, so that you can have a better idea of exactly what the printed report will look like.

The Grid style looks more like a spreadsheet, with boxes around each row and column, but it has no header section (except for the column headings). It has some interesting features. You can change the displayed width of columns by clicking on the border between two columns in the row of headings, and dragging it left or right. You can change the order of columns by clicking a heading, and dragging it left or right. When you print the report, the grid is not printed.

You can also select between the **Portrait** (normal) and **Landscape** (sideways) Orientations for the report.

In addition, you can specify the **Report Title** on this window, though it will only be shown on the report if you use the Normal Report Style, not the Grid style.

Once you have your desired statement entered, click the **Run** button. If there are errors in the SQL, a message box will come up explaining the error. If the SQL is valid, the results will be displayed as a very simply formatted report on the [Reports](#) window, as if it was a normal report. From there, you can do anything you could normally do on the Reports window, including [Sorting](#) or [Filtering](#) the data, Printing the result, and using **Save As** to [save the results](#) to a text file or other file format. However, if you are considering exporting to formatted Excel with the **Save As** button, please see the warning about problems with that [here](#).

**Note:** any columns that hold dollar figures (or other currency figures, if you are not in a country that uses dollars) will automatically have a total created for them at the bottom of the report.

If you enter the program with the [Donors Only Password](#), you cannot run SQL that references any database tables or columns that include financial information, such as pledges, donations, receipts, bank deposits and cash counts.

#### Memorizing your Report

You can [memorize a report](#) in the SQL Select window with the **Memorize Report** button. That will memorize the SQL, Report Style, Orientation and Report Title, and allow you to replay it later with the **Reports** ⇒ **Memorized Reports** menu option. Or, you can wait until you are on the report-viewing window after clicking **Run** in this window, and use the **Memorize** button there, possibly after using the **Sort** or **Filter** buttons, since any sort or filter will also be memorized with the report.

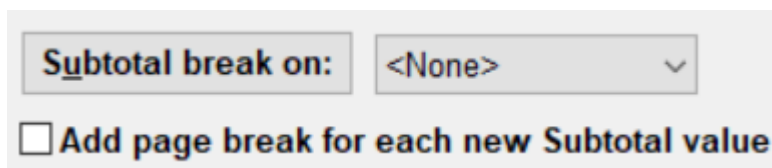
When you replay a report memorized from this window, with **Reports** ⇒ **Memorized Reports**, you have two choices, depending on whether or not you check "Display reports memorized from the Database ⇒ SQL Select window in that window, instead of immediately", in that window. If you check it, that will first come back to this SQL Select window to let you review the details, and run it from here. If you don't check that checkbox, it will just immediately run the report.

See [Memorized Reports](#) for full details.

#### Adding Subtotals to your Report

Normally reports generated from this window (or Custom Reports) will automatically add totals at the bottom of the report, for any selected fields that are Amount or Count fields. (Count fields are ones like "# Donors", and "# Donations".)

If the full window is being displayed, showing the actual SQL, there is an **Add Subtotals** button on the window. Clicking that button changes the **Add Subtotals** text to read **Subtotal break on:**, and displays a drop-down list of fields in your SQL to the right of the button, as follows:



That drop-down list then allows you to pick a field other than an Amount or Count field. Whatever you choose (other than the initial value of "<None>") will be set to be the first field in the sort order (the ORDER BY section of the SQL). And when you **Run** the report, each time the value of that field changes in the report's data, there will be a subtotal break, with text at the left like "Subtotals on *Value*:" (with *Value* replaced by the value of that field in the preceding lines), and subtotals of the Amount and Count fields.

The additional checkbox for **Add page break for each new Subtotal value** does exactly that, if you check it. That is, when the value in the selected field in the report data changes, then after including the subtotal row in the report, the next displayed rows in the report with different values in that selected field will start on a new page. If you don't check this checkbox, rows with a new value for the selected field just continue on the same page after the subtotal row, as long as there is room for them.

This may sound complicated, but if you try it, and read the messages that come up as you click on things in this area, it should become clear!

**Note:** If you memorize a report with a subtotal break, that will be included in what gets memorized. And if you use **Reports** ⇒ **Memorized Reports** with the "Display reports memorized from the Database ⇒ SQL Select window in that window, instead of immediately" checked, to return to this window for a report has a subtotal break, it will immediately be redisplayed in this window.

### Arguments for Donation Date, Category Selection and Working Year

There are six arguments that can be used in different combinations for selecting only a single donation date, a range of donation dates, a range of donation dates and optionally a donation category, the current fiscal year, or the current fiscal year and optionally a donation category, to include in the data selected by the report. These would be included in a **WHERE** clause in the report (which restricts the data to data satisfying a given condition). There are radio buttons in the [Custom Reports](#) window that make these be included automatically, but you can also use them directly if you understand what you are doing. The following are the options:

Please note that these arguments are case-sensitive, so for instance :donation\_date would not work if you wanted the first option below, :DONATION\_DATE.

- **:DONATION\_DATE** - if this is present, when you **Run** the report, a window will come up prompting for a single donation date to include in the report. This argument would generally be used in a SQL phrase such as:

```
WHERE donation.date_received = :DONATION_DATE
```

- **:DONATION\_FROM\_DATE** and **:DONATION\_TO\_DATE** - if these are both present, when you **Run** the report, a window will come up prompting for starting and ending donation dates to include in the report. Example SQL:

```
WHERE donation.date_received between :DONATION_FROM_DATE and  
:DONATION_TO_DATE
```

- **:DONATION\_FROM\_DATE**, **:DONATION\_TO\_DATE** and **:CATEGORYNUM** - if all three of these are present, when you **Run** the report, a window will come up prompting for starting and ending donation dates to include in the report, and optionally a single donation category to include. Example SQL:

```
WHERE donation.date_received between :DONATION_FROM_DATE and  
:DONATION_TO_DATE  
AND (:CATEGORYNUM = -1 OR category.categorynum = :CATEGORYNUM)
```

Note: the ":CATEGORYNUM = -1 OR" part makes the SQL work even if you don't select a category in the window prompting for a range of dates and an optional category. Also, you cannot use :CATEGORYNUM alone, without also including the codes for dates.

- **:FISCAL\_START\_DATE** and **:FISCAL\_END\_DATE** - if these are both present, and you have set up a fiscal year different from the calendar year in the **Maintenance**

⇒ **Organization Info** [window](#), then when you **Run** the report, a window will come up prompting for starting and ending donation dates within the current [fiscal year](#). (Note: when you do this, for it to work you have to use the `donors_last_2years` view in place of the usual `donors` table. This is done automatically for you when come from the **Custom Reports** [window](#).) Example SQL:

```
FROM donors_last_2years donors
...
WHERE donation.date_received between :FISCAL_START_DATE and
:FISCAL_END_DATE
```

- **:FISCAL\_START\_DATE, :FISCAL\_END\_DATE and :CATEGORYNUM** - if all three of these are present, and you have set up a fiscal year different from the calendar year in the **Maintenance** ⇒ **Organization Info** [window](#), then when you **Run** the report, a window will come up a window will come up prompting for starting and ending donation dates within the current [fiscal year](#), and for an optional single donation category to include. See the previous two bullet points for notes about the `:CATEGORYNUM` argument, and the use of the `donors_last2_years` view. Example SQL:

```
FROM donors_last_2years donors
...
WHERE donation.date_received between :FISCAL_START_DATE and
:FISCAL_END_DATE
AND (:CATEGORYNUM = -1 OR category.categorynum = :CATEGORYNUM)
```

There are two additional codes that can be used in the SQL in this window, which do not cause any prompting:

- **:FIRST\_FISCAL\_RECEIPT\_YEAR** - it will be replaced by 0 if fiscal year receipting and data entry is not turned on in the **Maintenance** ⇒ **Organization Info** [window](#), or by the number of the fiscal year in which that option was turned on if it is turned on. This is mostly for use in SQL generated by the **Reports** ⇒ **Custom Reports** [window](#), when displaying receipt numbers.
- **:YEAR** - it will be replaced by your current working year in the program, as shown in the title bar of the program's main window (as in "DONATION 2023 data for *Your Organization Name*", if it was 2023), and as set by the **Maintenance** ⇒ **Change Year** [menu option](#).

### Details and Examples

The DONATION database is composed of tables, one table for each type of data. The tables in the database are named **constants** (for your Organization Info, and to hold the current year number you are working on), **donor**, **donation**, **category** (for donation categories), **donor\_category1** and **donor\_category2** (for the donor categories) and **receipt**. There are a couple of other tables, but they are used only for very technical purposes and you are unlikely to want to select from them.

There is also a view (which behaves like a table) called **donors\_last\_2years**, which includes all donors in the current working year, plus all donors from the previous working year that are not present in the current working year, either because you deleted them, or because they were added after the initial copy of all donors to the new year, when you first switched to the new year.

Here is one example of how you might use this SQL Select routine directly, without going through **Reports** ⇒ **Custom Reports**. Suppose you wanted a list of your donation categories, for the donation year 2016. There is no report built into DONATION to create such a list. (Well, OK, there is, under **Reports** ⇒ **Category**. But this is still a good example!) Enter the following SQL statement:

```
Select * from category
Where year_number = 2016
```

Note that "\*" means "all columns in that table". When you **Run** this SQL, you will see that it generates a report listing three columns – Categorynum, Year Number and Description. You may decide that all you really want to see is the Description column. Close the Reports window, and change the SQL to say:

```
Select Description from category
Where year_number = 2016
```

Print off the result, and there is your list of donation categories!

To see what columns are available in each table, use "select \* from *tablename*" for the different tables. That will give you a report listing every column. You can then change the "\*" to one or more column names, separated by commas, to get the columns you are really interested in. For instance, "select Year\_Number, Description from category". All SQL entry is case-insensitive, i.e. it doesn't matter whether you enter upper case or lower case for things like column names and keywords like "Select".

For those who already understand SQL, the table structures are all defined in the file TABLES.SQL in the main program directory, usually C:\Program Files\Donation. For the [OnDemand](#) version, the program directory is not accessible - please [contact us](#) if you need a copy of this file.

One problem you can have if you use this utility to create reports, is that the report may be too wide to print. There are a couple of things you can do to resolve this problem. If it's only a bit too wide for the standard print format (which is in Portrait mode, where the page is vertical), select the Landscape radio button in the SQL Select window to switch to Landscape mode, where the page is horizontal. Another obvious option is to reduce the number of columns you are displaying. If you use the Grid Report Type, you can click and drag to make the columns narrower.

As with any other report that is displayed, you can export the results of a SQL Select to various output formats, including Excel, using the [Save As](#) button once the report is displayed. This is one good way to "pretty up" a report created with SQL Select or Custom Reports, if you are not quite satisfied with the results. However, there are some problems with exporting formatted Excel, which you can read about [here](#).

If you need further help with this option, feel free to [contact support](#) for assistance.

For more information on how to write SQL, there is a web page with a list of several SQL tutorials, at <http://www.thefreecountry.com/developercity/sqltutorials.shtml>.

### Making Changes with SQL Statements

It is also possible to use this window to make changes to the data in your database, using the SQL INSERT, DELETE and UPDATE statements. In normal usage there would be no reason to do this, because all normally required tasks can be done using the other features of

DONATION. However, in rare cases, particularly if we are helping you with a technical support issue, this may be appropriate. You will need us to give you a special password in order to run such SQL commands.

Note to Users of Version 2.70 or Earlier of DONATION

If you previously used version 2.70 or earlier (last released in mid-2007), which used the Sybase Adaptive Server Anywhere database, and have upgraded to version 3.00 or higher, which uses the Firebird database, some of the database field names have been changed, and also there are some fairly minor "dialect" differences in the SQL used by the two databases. As a result, if you had any saved SQL files that you used with SQL Select with the older version, they will probably need some adjustment in order to work with the new version. You can use the techniques in this help page (for example using "select \* from *tablename*", or consulting the file TABLES.SQL) to determine the new field names. If you get stuck, contact [technical support](#).

## 23 BACKING UP AND RESTORING YOUR DATA

### 23.1 Backup and Restore Options

[Making Data Backups](#)

[Restoring Backups](#)

[Emailing Backups](#)

[Restoring Emailed Backups](#)

[Making Internet Backups](#)

[Restoring Internet Backups](#)

[Restoring Non-Backup Databases](#)

[Setting Backup Reminder Frequency and Options](#)

[Passwords for Email and Internet Backups](#)

[Internet Backup Security](#)

### 23.2 Making Data Backups

As with any software program, it is vital to safeguard your data. You can lose it due to hardware failure, or software problems. There may even be bugs in this software which have not yet been discovered which could damage your data (although we certainly make the best possible efforts to avoid that eventuality!). In addition, you might accidentally make some wrong entries or menu choices in the program which you want to undo in a simple manner.

The only sure safeguard against any of these problems is to make regular backups, which should normally be done using **Backup/Restore ⇒ Backup Database**. Note that if you do regular backups of your hard disk outside of the DONATION program, the database will also be successfully backed up, as long as the DONATION program is not running at the time the backup is made, and DONATION's [data directory](#) and all of its subdirectories are included in the backup. (However, those backups would be an actual copy of your database file, not the same type of backup as is made with **Backup/Restore ⇒ Backup Database** and restored with **Backup/Restore ⇒ Restore Database**.)

An alternative to using **Backup/Restore ⇒ Backup Database** is to use **Backup/Restore ⇒ Email Backup** to [email a compressed and encrypted backup](#) to an email address, which could be your own, or a colleague's.

A backup is not a document, meant to be "opened" for viewing. It is a compressed version of your entire database (all years of data). More information about that is below.

The first time you make regular backups in the program, with the **Backup/Restore ⇒ Backup Database** menu option (or when you are first prompted to do a backup as you are exiting DONATION), you will be asked whether you would like to set up to do [Internet backups](#) as well, after each regular backup. This allows you to keep another copy of your last three backups, in a [secure](#) location on the Internet. If you do set up Internet backups, then every regular backup will be immediately followed by an Internet backup, unless you have set up the [Cloud Storage Service](#), in which case those Internet backups are instead done automatically every time you exit the program.

It is important to understand that once you have multiple years of data in DONATION, all of those years of data are always backed up together, by either type of backup. There is no way to backup only one year of data.



A good general rule about how often to back up is based on how much you would hate re-doing your work. If you put in a set of entries on one day, and you hate the thought of having to re-enter them if something goes wrong, make a backup immediately and you are protected. If you make few enough entries that you could bear the thought of re-doing a whole month's work if something went wrong, you can do your backups once a month.

The backup procedure is simple. Select **Backup/Restore** ⇒ **Backup Database**. A "Save Backup File As" dialog box then appears, where you select the drive and/or directory to save it in. You can use this option to back up to a USB memory key, your hard drive, a writeable CD, or a shared directory on a local area network. You can create new subdirectories in this dialog box, by clicking into the box for files, right-clicking your mouse, and selecting **New** ⇒ **Folder**.

I strongly recommend you to **not** do your backups to a directory on your local hard drive (C:). If you do only that, and your hard drive dies (which happens surprisingly frequently!), you will have lost everything. And in fact, if you do that, the program warns you about this, and asks you to confirm that this is really what you want to do.

The default backup file name is DONATION-YYYY-MM-DD.HH.MM.SS.DB.GBK, where the YYYY-MM-DD.HH.MM.SS part is replaced by the current date and time, in that format. (Earlier versions used the backup file name DONATION4.DB.GBK, with no date component, or included the date but omitted the time.) You can also change that file name in the "Save Backup File As" dialog box, as long as it ends in the same ending, ".DB.GBK". If you have used the **Database** ⇒ **Switch Databases** [option](#) to use a different database for another organization with a different file extension (for example if your database is DONATION4.ABC), then the default backup file name will be DONATION-YYYY-MM-DD.HH.MM.SS.ABC.GBK, and if you change that name, you will still have to leave it ending in ".ABC.GBK". If you have multiple databases created with **Database** ⇒ **Switch Databases**, each must be backed up independently, and the program warns you of this fact any time you backup one of them.

After you have made the backup, the program will inform you whether it was successful, and if it wasn't, it will display any error messages

**Note:** The "Save Backup File As" dialog box will always initially display the previous drive and directory into which you saved a backup using **Backup/Restore** ⇒ **Backup Database**. The first time it is used in a new install of DONATION, it will default to the Backup subdirectory of your [Data Directory](#) on your main hard drive. However, although it is not a bad idea to backup to that directory (or any other selected directory) on your hard drive, as mentioned above you really need to also backup elsewhere (for example to a USB memory key, or a writeable CD) in case your hard drive ever fails.

**Note:** Database backups made with versions of DONATION prior to version 3.00 (which was released in late 2007) cannot be restored with the standard **Backup/Restore** ⇒ **Restore Database** menu option to version 3.00 or later, because a different database format was used. Those backups are named DONATION3.DB (or DONATION3.*something* if you have multiple databases.) If you need to convert them, [contact us](#) for assistance.

#### What is Included in a Backup File

- All of your regular data in the database, for all years, including donors, donations, categories, receipts, bank deposits, etc.

- All template mail-merge letters and receipts, both the originals distributed with the program and ones you have edited
- Memorized reports and memorized donations
- Settings displayed in the **Tools** ⇒ **View Saved Settings** [window](#), under the heading **Current Database settings stored in the Database**.

### Opening / Using Backup Files

Backup databases created via **Backup/Restore** ⇒ **Backup Database** can be restored, which replaces your entire database with what is in the backup, by double-clicking on them in a Computer, My Computer or Windows Explorer window, as long as DONATION is not currently running. This will cause DONATION to open, and prompt you as to whether to restore the backup. (See [Restoring Backups](#) for details on how this works.) They can also be restored directly within the DONATION program by using the **Backup/Restore** ⇒ **Restore Database** [menu option](#). There is no way other than restoring a backup to DONATION to access the data in it.

### Backing Up to Network Paths

With the Standard, legacy Lite or Local Network Server versions of DONATION, you can backup directly to a drive on another computer on your network by using mapped drives, as long as you have write permission on those drives.

You can also backup to what are known as UNC paths, such as `\\servername` etc.

See [below](#) for how backups work for the Local Network Client version.

### Warning about Using Standard File Copies

Although you can also successfully back up and restore your database file (DONATION4.DB) just by using standard file copying methods (for example using Computer, My Computer, Windows Explorer, or the COPY command in a Command Prompt), or via specialized backup software, the manual for the Firebird database software used by DONATION advises that you **should not do this while you are running DONATION!** It says that could possibly lead to your database becoming damaged and unusable.

### Backup Reminders

By default, the program reminds you weekly to backup your database, as you are exiting the program. If you wish to be reminded with a different frequency, you can use the **Backup/Restore** ⇒ **Backup Frequency and Options** [window](#). This gives you the option of Never, Daily, Weekly, or Monthly. If you don't set it, it defaults to Weekly.

If you have not done a backup within the configured period of time (with either **Backup/Restore** ⇒ **Backup Database** or the **Backup/Restore** ⇒ **Email Backup** [option](#)), you will be prompted to do a backup the next time you exit the program.

### Deleting Old Backups

Because each backup is by default given a distinct name, including the date it was made, the backups will tend to accumulate in whatever drive and directory you are saving them. To allow you to control this, that same **Backup/Restore** ⇒ **Backup Frequency and Options**

[window](#) gives you an option to either retain all backups, or retain only the latest "N" backups in each backup directory, where you set the value "N" (between 3 and 20). If you do not set this, the default is to retain all backups.

If you do set that value, whenever you make a backup, the other backups in the same directory are examined, and only the most recent "N" of them are kept, with the older ones being deleted.

Note that even if you do set this, only backups whose name starts with "DONATION" will ever be deleted. This gives you a way to force certain backups to be retained indefinitely - just edit their name as you are making them to insert something before "DONATION". For instance, you might name a year-end database made at noon on December 15, 2015 "2015YearEndDONATION-2015-12-31.12.00.00.DB.GBK", instead of just the standard filename the program suggests, "DONATION-2015-12-31.12.00.00.DB.GBK".

#### Backing up for users of the Local Network Client Version

For users of the normal single-user versions of DONATION, or the [Local Network Server](#) version, backups work exactly as described above. However, for users of the [Local Network Client](#) version (where the database is on another computer running the Local Network Server Version), it is quite different.

When you do a backup from the Local Network Client Version, the backup is not done on your computer. Rather, your computer sends an instruction to the computer running the Local Network Server Version of DONATION, to do the backup. The backup is of a database file on that server computer, and must backup to another file on that server computer.

Because of this, the normal "Save Backup File As" dialog box cannot be used, because that dialog box refers to files on (or visible from) your computer, whereas the backup will be done to a file on the server computer. So instead, a simple window comes up, titled Network Backup, which prompts you to type in the full path and filename, **relative to the server computer**, to backup to. That is always already filled in, with something that is almost always correct, so generally you should not change it.

You **cannot** specify a drive that is a network drive on a computer other than server computer, even if it is a mapped drive on that server computer. You also cannot specify UNC paths.

Because of these limitations, it is easier to always do your backups for the Local Network Version from the computer running the Local Network Server Version of DONATION, if that is an option for you.

If you have configured to make [Internet Backups](#) after each normal backup, the Local Network Client version will also do that. Like the backup itself, the Internet Backup is done by sending a command to the computer running the Local Network Server version to do that step, and then gets back the results of that command and lets you know whether it was successful.

The Backup Reminders apply to all users, including users of the Local Network Client Version of DONATION. However, if you are using the Local Network Version, there is only one database, so really, only one user needs to be regularly backing up the database. So, you may want to change the Backup Reminder Frequency for the other users to Never. (Each user has their own setting for that Backup Reminder Frequency.)

The setting mentioned above to retain only the latest "N" backups also does not apply (and thus cannot be set!) for the Local Network Client Version of DONATION, because it cannot "see" the other backups on the Local Network Server Version's computer, in order to decide which to delete. (And it couldn't delete them either.)

**See Also:** [Restoring Backups](#)

## 23.3 Restoring Backups

Restoring a backup means replacing your entire database (all years of data) with what is in the backup, which is what was in your database at the date and time that backup was created.

If you ever do have a problem and need to restore from a backup file on your hard drive, USB memory key or CD etc., it is very easy.

Note: Users of the [Local Network Client](#) version of DONATION cannot restore backups - that must be done from the [Local Network Server](#) version.

Restoring a backup to the same computer it was made from should only be done if you have had your computer or hard drive die, and thus lost your database, or you have taken some action in DONATION that you need to reverse, there is no other way to reverse that action, and your backup is recent enough that you are willing to go back to it.

The other time you might want to restore backups is if you have DONATION on multiple computers, with copies of the same database, and you are [transferring](#) that database between those computers. For some users of the legacy [Lite](#) or Standard versions this may be a common occurrence, if you are sharing a database between multiple computers. If that is a regular requirement, though, please consider the [Cloud Storage Service](#) which automates that process. With this [Local Network](#) versions, this will not come up unless you have to change which computer is running the Local Network Server version of the program.

### Quick Way

If you are viewing the backup file in My Computer, Computer, Windows Explorer, or as an attachment in an email program, you can double-click on the file (or right-click and pick "Restore to DONATION" from the popup menu). Such files will usually be named DONATION4.DB.GBK, DONATION-YYYY-MM-DD.DB.GBK, or DONATION-YYYY-MM-DD.HH.MM.SS.DB.GBK, where YYYY-MM-DD is replaced by the date the backup was made, in that format, and HH.MM.SS by the time the backup was made. Double-clicking on them will then start or activate DONATION, and prompt you to confirm that you want to restore the backup file.

Prior to recent releases of DONATION, the program also had to not already be running for this way to work. Now that is not a problem.

Note: If you are restoring from an attachment in an email program such as Outlook, when DONATION prompts for whether to restore the file, the filename may have been modified somewhat. That is normally not a problem - you can restore it anyways.

### Standard Way

Select **Backup/Restore** ⇒ **Restore Database**. It will prompt you with a "Restore Backup File" dialog box, where you select the backup file and the directory it is in. The file has to have the same extension as your current database file plus the additional backup file extension ".GBK". So if your database has the normal filename DONATION4.DB (which it will, unless you are using **Database** ⇒ **Switch Databases** to handle multiple databases), then the backup file to be restored will usually be named DONATION4.DB.GBK, DONATION-YYYY-MM-DD.DB.GBK, or DONATION-YYYY-MM-DD.HH.MM.SS.DB.GBK (though you could have named it *anything*.DB.GBK when you did the backup). Again, YYYY-MM-DD is replaced by the date the backup was made, in that format, and HH.MM.SS by the time the backup was made. Once you select the file to restore, just follow the prompts, and it will do the restore.

If you *are* using **Database** ⇒ **Switch Databases** to handle multiple databases, you can only restore the backup corresponding to the database that you are currently using. So if you are currently on a second database named DONATION4.OTHER, the backup file you would restore would normally be named DONATION4.OTHER.GBK or DONATION-YYYY-MM-DD.HH.MM.SS.OTHER.GBK.

The restore is done by completely replacing your existing database file with the restored backup file. Once this has been completed, it will restart the program so that it can use the newly restored database.

The "Restore Backup File" dialog box will always initially display the last drive and directory from which you did a backup using **Backup/Restore** ⇒ **Backup Database**.

#### Restoring DONATION3.DB Backup Files from Previous Versions of DONATION

Database backups made with versions of DONATION prior to version 3.00 (which was released in late 2007) can not be restored directly to version 3.00 or later using **Backup/Restore** ⇒ **Restore Database**, or by double-clicking on them, because a different database format was used. If you need to restore a previous-version backup (for example a file named DONATION3.DB) please [contact us](#) for assistance.

#### Restoring Emailed Backups

If a backup has been emailed to you, it may be called DONATION4.DB.S4B, DONATION-YYYY-MM-DD.DB.S4B, or DONATION-YYYY-MM-DD.HH.MM.SS.DB.S4B. That is not restored with **Backup/Restore** ⇒ **Restore Database**. Instead, use the **Backup/Restore** ⇒ **Restore Emailed Backup** [menu option](#). (You can also double-click an emailed backup attachment to open it.)

#### Warning about Using Standard File Copies

Although you can also successfully back up and restore your database file (DONATION4.DB) just by using standard file copying methods (for example using Computer, My Computer, Windows Explorer, or the COPY command in a Command Prompt), or via specialized backup software, the manual for the Firebird database software used by DONATION advises that you **should not do this while you are running DONATION!** It says that could possibly lead to your database becoming damaged and unusable.

#### Doing Temporary Database Restores

In some unusual cases you may just want to look at an old backup of the database, without switching to it permanently. If you want to do that, first make a backup of your current database and save it carefully. Then restore the older backup that you want to look at. When you are done with it, restore the new backup.

### Restoring Older Backups

If you select a backup to restore that is older than your current data (i.e. you have entered further donations, with later dates, since that backup was made), the program will give you a very explicit warning about this, and ask you twice to confirm that you really wish to do this. That's because doing such a restore will cause the more recent data, entered since that earlier backup, to be lost!

### Restoring for users of the Local Network Version

Only a user on the computer that has the [Local Network Server](#) version installed on it can do restores. Users of the Network Client version will receive a message explaining that they cannot do restores.

### Restoring from Network Drives and Paths

Backups **can** be restored from mapped network drives, or what are known as UNC paths (\servername etc.).

## 23.4 Emailing Backups

The most common way to make backups of the program's database is via the **Backup/Restore** ⇒ **Backup Database** [menu option](#), which saves backups onto your hard drive, or a drive accessible from your PC (such as a USB memory key, a writeable CD or DVD, or a network drive).

However, another option is the **Backup/Restore** ⇒ **Email Backup** menu option. This allows you to email a database backup as an attachment, either to yourself, or to someone else. This can be helpful when you are [moving the program from one computer to another, transferring your data](#) between multiple computers on which you have installed DONATION, or you just want to have an "off-site" backup, sitting in the servers of your web mail provider (such as Hotmail, Gmail or Yahoo Mail) or in an email program that you have on another computer. If you have multiple databases created with the **Database** ⇒ **Switch Databases** [menu option](#), each must be backed up, whether regularly or by email, independently.

**Note:** Users of the [Local Network Client](#) version of DONATION cannot email backups or restore emailed backups - that must be done from the [Local Network Server](#) version.

It is important to understand that once you have multiple years of data in DONATION, all of those years of data are always backed up together, by either type of backup. There is no way to backup only one year of data.

Before you can use Email Backups, the **Maintenance** ⇒ **Email Sending Configuration** [menu option](#) must have been used, to set up how emails are sent from DONATION.

The database backups that are sent by email are compressed (made smaller, to make them email more quickly) and encrypted (scrambled, with a password that you provide, for better



security). **IMPORTANT:** If you forget the password that you specify for encrypting your emailed database (in the steps below), we **cannot** help you restore that database. So you **must** remember that password yourself. The passwords are case-sensitive.

Databases that you have emailed can be restored to a DONATION program by using the **Backup/Restore ⇒ Restore Emailed Backup** [menu option](#). Alternatively, you can select to open the attachment in your email program, or save it and then double-click on it in a Computer, My Computer or Windows Explorer window, as long as DONATION is **not** currently running. Either of these actions will cause DONATION to open, and prompt you as to whether to restore the backup. (See [Restoring Emailed Backups](#) for details on how this works.) There is no way other than restoring a backup to access the data in it.

When you select **Backup/Restore ⇒ Email Backup**, the program first creates the database backup, storing it in a standard folder and filename, with no prompting. (Specifically, it is stored in the Backup directory underneath the program's [data directory](#), with the filename DONATION-YYYY-MM-DD.HH.MM.SS.DB.Encrypted, where YYYY-MM-DD is filled in with the current date, in that format, and HH.MM.SS is the current time.) If you are backing up an alternate database, created with the **Database ⇒ Switch Databases** [menu option](#), which has a different file extension, that extension will replace the ".DB" part of the filename.

Next, you will see the following window for you to specify the password that you want to use for the encryption of the database. If you want to be sure you know what you are typing in, click the "Make password visible rather than stars" checkbox. Note: if you enter too weak a password you will be encouraged to enter a [strong password](#) instead.



The image shows a Windows-style dialog box titled "Email Backup Encryption Password". The background is light yellow. The title bar is blue with white text. Inside the dialog, the text "Please enter the backup encryption password" is in bold. Below this text is a white rectangular text input field. To the right of the input field are three buttons: "OK", "Cancel", and "Help", each with a blue border and white text. Below the input field is a checkbox with the label "Make password visible rather than stars".

After you click OK, followed by a short pause, a message comes up indicating that the encryption was successful. Next, the following email sending window comes up:



**Send Email**

**From:** Name: Dan Cooperstock at Software4Nonprofits.com Email: info@software4nonprofits.com **Send**

**To:** Name: Email: **Cancel**

☐ Cc: to yourself ☐ Bcc: to yourself **Help**

**Subject:** DONATION Database Backup

**Attachment:** C:\Users\Public\Documents\Cooperstock Software\Donation\Backup\DONATION- **Browse ...**

**Body:** The attached file is an encrypted backup from the DONATION program from Software4Nonprofits.com.

To restore it to the same or another installation of DONATION, do as follows:

EITHER:

- Double-click on the attachment, or otherwise Open or Run it from your email program.

OR do the following three steps:

(Of course, it will have **your** details in the From Name and Email fields.) All you have to do is fill in the To Name and Email address, to determine who the email is to be sent to (generally yourself or a colleague in your organization), and click **Send**. If you have used **Backup/Restore ⇒ Email Backup** successfully before, the To Name and Email will even be memorized for you, and restored to this window when it comes up, so that unless you want to send it to someone different, all you have to do is click **Send**.

The To Email can include multiple email addresses separated by semicolons, such as "john@gmail.com;mary@gmail.com", without the quotes. If you do that, a single email will get sent, with both addresses on the "To" line.

If you are sending the email to an email address other than your own (i.e. the From Email and To Email are different), you may also optionally check the "Cc: to yourself" or "Bcc: to yourself" checkboxes, to send a copy or blind copy respectively of the email to your From Email address.

The name of the encrypted attachment is always DONATION-YYYY-MM-DD.HH.MM.SS.DB.S4B, where YYYY-MM-DD.HH.MM.SS is the current date and time. If you are backing up an alternate database, created with the **Database ⇒ Switch Databases menu option**, which has a different file extension, then the ".DB" part will change. For instance, if the database is named DONATION4.OTHER, the attachment will be DONATION-YYYY-MM-DD.HH.MM.SS.OTHER.S4B. ("S4B" stands for **Software4Nonprofits Backup!**)

### Deleting Old Backups

Because each backup is by default given a distinct name, including the date it was made, the backups will tend to accumulate in the standard directory used for creating the email backups (the Backup directory underneath the program's [data directory](#)). To allow you to control this, the **Backup/Restore ⇒ Backup Frequency and Options window** gives you an option to either retain all backups, or retain only the latest "N" backups in each backup directory, where

you set the value "N" (between 3 and 20). If you do not set this, the default is to retain all backups.

If you do set that value, whenever you make a backup, the other backups in the same directory are examined, and only the most recent "N" of them are kept, with the older ones being deleted. (Both the .Encrypted and the .S4B files will be deleted, with the most recent "N" of each being kept.)

## 23.5 Restoring Emailed Backups

If someone (including yourself!) has sent you a DONATION database backup via an email, by using the **Backup/Restore** ⇒ **Email Backup** [menu option](#), you can restore it to the program (replacing whatever is currently in the database) very easily.

**Note:** Users of the [Local Network Client](#) version of DONATION cannot restore backups - that must be done from the [Local Network Server](#) version.

Restoring a backup to the same computer it was made from should normally only be done if you have had your computer or hard drive die, and thus lost your database, or you have taken some action in DONATION that you need to reverse, there is no other way to reverse that action, and your backup is recent enough that you are willing to go back to it.

The other time you might want to restore backups is if you have DONATION on multiple computers, with copies of the same database, and you are [transferring](#) that database between those computers.

The email you received contains instructions for restoring the backup, but we will expand on them a bit here.

### Quick Way

If you are viewing the emailed encrypted backup file (usually named DONATION-YYYY-MM-DD.HH.MM.SS.DB.S4B, where YYYY-MM-DD.HH.MM.SS is replaced by the date and time the backup was made) as an attachment in an email program (or in My Computer, Computer, or Windows Explorer if you have saved the attachment), you can double-click on the file (or right-click on it and pick "Run" or "Open"). That will then start or activate DONATION, and prompt you to confirm that you want to restore the emailed backup file.

Prior to recent releases of DONATION, the program also had to not already be running for this way to work. Now that is not a problem.

Backup files from earlier versions of the program may omit the time component in the filename, or from even earlier versions they may omit both the date and the time and just start with "DONATION4".

If you are using **Database** ⇒ **Switch Databases** to handle multiple databases, the ".DB" part of the emailed backup file will instead match the file extension for the alternate database you backed up. For instance, if an alternate database was named DONATION4.OTHER, the attachment would be DONATION-YYYY-MM-DD.HH.MM.SS.OTHER.S4B. ("S4B" stands for **Software4Nonprofits Backup!**) Only a backup from the correct database can be restored to that same database.

Note: If you are restoring directly from the attachment in an email program such as Outlook, when DONATION prompts for whether to restore the file, the filename may have been modified somewhat. That is normally not a problem - you can restore it anyways.

If you are using this method, please skip down to the section lower on this page on "Entering the Encryption Password" for your next step.

### Standard Way

Your alternative is to use the **Backup/Restore ⇒ Restore Emailed Backup** menu option in the program.

Before starting this option, you need to save the attachment from the email to a folder where you can find it, such as your Desktop. How this is done depends on which email program you use. For instance, there may be a button or link to save attachments in emails, or you might right-click on the attachment and pick Save or Save As from a popup menu. (The latter is how it works in Microsoft Outlook.) Be sure to save it with the same filename it came with.

The name of the attachment is usually DONATION-YYYY-MM-DD.HH.MM.SS.DB.S4B, where YYYY-MM-DD.HH.MM.SS is replaced by the date and time the backup was made. Again, if you have multiple databases, the ".DB" part will change accordingly to the extension of the database that was backed up. As mentioned above, backup files from earlier versions of the program may omit the time component in the filename, or from even earlier versions they may omit both the date and the time and just start with "DONATION4".

When you select **Backup/Restore ⇒ Restore Emailed Backup**, a Restore Backup File window comes up. Navigate in that window to the folder into which you saved the attachment (for instance your Desktop), and select the filename of the attachment (normally DONATION4.DB.S4B, DONATION-YYYY-MM-DD.DB.S4B, or DONATION-YYYY-MM-DD.HH.MM.SS.DB.S4B, as explained above). Click **Open** to confirm it.

### Entering the Encryption Password

Next, a window comes up in which you specify the encryption password that was used when sending the backup by email. (The backup is encrypted, or scrambled, for your security.)



Enter that password. If you want to be sure you know what you are typing in, click the "Make password visible rather than stars" checkbox. **IMPORTANT:** If you forget the password that you specified for encrypting your emailed database, we **cannot** help you restore that database. So you **must** remember that password yourself. The password is case-sensitive.

Assuming the password is correct, a series of messages will now come up, informing you that the file has been decrypted successfully, and confirming that you want to do the restore from the decrypted file. Finally, you will get a message saying that the restore was successful.

Once you have completed the restore, you can freely delete the attachment from your computer if you saved it (for example from your Desktop, if you saved it there). The only reason to keep it would be if you think you might need to restore the same file again, and you have already deleted the email it was saved from. (If you still have the email, you could get the attachment from it again.)

Emailed backups can also be used to initialize the database for a new installation of DONATION, on a new computer. See [Startup Options](#) for details.

### Restoring Older Backups

If you try to restore an email backup that is older than your current data (i.e. you have entered further donations, with later dates, since that backup was made), the program will give you a very explicit warning about this, and ask you twice to confirm that you really wish to do this. That's because doing such a restore will cause the more recent data, entered since that earlier backup, to be lost!

## 23.6 Making Internet Backups

**Note:** The [OnDemand](#) version does not have Internet backups, because its database is already on a server in the cloud so it does not seem necessary to store backups on a 2nd server. Backups that you make with the OnDemand version can be to the same server that it runs on.

The first time you make regular backups in the program, with the **Backup/Restore ⇒ Backup Database** menu option (or when you are first prompted to do a backup as you are exiting DONATION), you will be asked whether you would like to set up to do Internet backups as well, after each regular backup.

Internet backups are [highly secure](#) encrypted backups of your database, sent to a secure location on the Software4Nonprofits.com web server for storage. Of course, high-speed Internet access on your computer is required for this to be a reasonable option.

There is no option to just make an Internet backup without first making a regular backup. The reason for this is that it does not seem wise to rely only on Internet backups - your first "line of defense", in the case of hard drive crashes etc., should always be a regular local backup, preferably made to something off of your hard drive, like a USB memory key. The Internet backup then provides a secondary restore option, in case your hard drive dies and you cannot find your local backups.

Before you can make Internet backups, they need to be configured via the options in the bottom half of the **Backup/Restore ⇒ Backup Frequency and Options** [window](#). That includes setting up a [strong](#) Internet backup encryption password, which is also the one you will use for making Internet backups.

Once that has been configured, every time you make a normal backup, you will then be prompted for your Internet backup encryption password to do the Internet backup. As long as you supply it and click **OK** in the password window, your encrypted backup will then be sent to

its secure online storage location. It can be restored, if required, with the **Backup/Restore ⇒ Restore Internet Backup** [menu option](#).

Your Internet backup file will be named DONATION-YYYY-MM-DD.HH.MM.SS.DB.S4E, where YYYY-MM-DD.HH.MM.SS is the current date and time. ("S4E" stands for **Software4Nonprofits backup Encrypted**.)

Only your three most recent Internet backups are retained, in order that the amount of storage used on the Software4Nonprofits.com web server not become excessive. In addition, backups over 1 year old may be removed. (Of course, you should be making backups more often than three times per year, so this should not be an issue for you!)

#### Internet Backups when you have Multiple Databases

Like all other forms of backups, if you are maintaining multiple databases for multiple organizations, with the **Database ⇒ Switch Databases** [menu option](#), only your current database is backed up when you make an Internet backup following a regular backup. See also the [section](#) on this topic in the Help page on configuring Internet backups.

If an alternate database is named, say, DONATION4.OTHER, your Internet backup file will be named DONATION-YYYY-MM-DD.HH.MM.SS.OTHER.S4E.

#### Internet Backups and the Cloud Storage Service

If you turn on the [Cloud Storage service](#), your Internet backups and restores are done automatically, more or less every time you start and exit the program. When that is turned on, regular backups are not followed by Internet Backups.

#### Internet Backups when you have DONATION on Multiple Computers

Please see the [section](#) on this topic in the Help page on configuring Internet backups, to understand how to ensure that the multiple copies of your database all use the same Unique ID.

#### Internet Backups in the Local Network Client version of DONATION

The [Local Network Client](#) version makes both the main local backup and the Internet Backup by sending commands to the computer running the Local Network Server version, where those backups are actually performed for you. Then it gets the results of those actions back from that computer and reports them to you.

**See Also:** [Restoring Internet Backups](#), [Configuring Internet Backups](#), [Internet Backup Security](#)

## 23.7 Restoring Internet Backups

**Note:** The [OnDemand](#) version does not have Internet backups, because its database is already on a server in the cloud so it does not seem necessary to store backups on a 2nd server. Backups that you make with the OnDemand version can be to the same server that it runs on.

Assuming that you have configured the options for Internet backups in the bottom half of the **Backup/Restore ⇒ Backup Frequency and Options** [window](#), and you have previously

made at least one [Internet backup](#), if you ever need to restore an Internet backup, you do so with the **Backup/Restore ⇒ Restore Internet Backup** menu option.

**Note:** Users of the [Local Network Client](#) version of DONATION cannot do Internet backups or restore Internet backups - that must be done from the [Local Network Server](#) version.

Restoring a backup to the same computer it was made from should normally only be done if you have had your computer or hard drive die, and thus lost your database, or you have taken some action in DONATION that you need to reverse, there is no other way to reverse that action, and your backup is recent enough that you are willing to go back to it.

The other time you might want to restore Internet backups is if you have DONATION on multiple computers, with copies of the same database, and you are [transferring](#) that database between those computers. See the [section](#) on this in the Help page on configuring Internet backups for some important instructions in that case, because you have to first make sure they are using the same Unique ID for Internet backups.

When you select **Backup/Restore ⇒ Restore Internet Backup**, you will first be prompted for your Internet backup encryption password. This must be the same password that was used to make the backup you will be restoring.

Next, you will be shown a window containing the filenames of whichever Internet backups have been stored online. The filenames contain the date and time the backup was made, in the format YYYY-MM-DD.HH.MM.SS. A typical filename would be DONATION-YYYY-MM-DD.HH.MM.SS.DB.S4E. (The ".DB" part would be different if you are in a secondary database, which you have switched to with the **Database ⇒ Switch Databases** [menu option](#).) Filenames from earlier versions of the program may omit the time component in the filename, but they can also be restored.

Only your three most recent Internet backups are retained online, in order that the amount of storage used on the Software4Nonprofits.com web server not become excessive. In addition, backups over 1 year old may be removed. (Of course, you should be making backups more often than three times per year, so this should not be an issue for you!) So, the maximum number of backups that will be displayed in the selection window will be three.

In the case where you have only ever made one online backup, the selection window is not displayed, and instead you are just prompted to confirm that you want to restore that one backup, with its filename (showing the date in the format mentioned above) displayed.

After this, a series of self-explanatory windows and messages will explain what steps are being done to restore your backup.

### Restoring Older Backups

If you select a backup to restore that is older than your current data (i.e. you have entered further donations, with later dates, since that backup was made), the program will give you a very explicit warning about this, and ask you twice to confirm that you really wish to do this. That's because doing such a restore will cause the more recent data, entered since that earlier backup, to be lost!

**See Also:** [Making Internet Backups](#), [Configuring Internet Backups](#), [Internet Backup Security](#)



## 23.8 The Cloud Storage Service

**Note:** In the [OnDemand](#) version of the program, the Cloud Storage Service is not used. The OnDemand version, and the Cloud Storage Service in the Standard Version of DONATION, are alternate ways of having multiple users on different computers. So the following page is not relevant for users of the OnDemand version.

**Some users with fast, reliable Internet on all computers on which they want to use DONATION (which is also required for the Cloud Storage service), may prefer the [OnDemand](#) version, because of its very easy installation and ability to have multiple simultaneous users. Another option, if all of the computers on which you need to run DONATION are in the same location, is the [Local Network](#) Versions. Please see [Multiple User Options](#) for the pros and cons of each of these versions.**

The Cloud Storage Service is sort of a combination of the techniques in the Help topics [Transfer your Data between Computers](#), [Making Internet Backups](#), and [Restoring Internet Backups](#). Please read each of those topics before continuing with this topic, to understand the background.

**For paid users of the Standard version, no additional payment is required for using the Cloud Storage Service** - you do not have to pay for additional users. The Service is just a standard feature of that version. (Of course, no payment is required at all if you are still evaluating the program, or using the free legacy [Lite](#) version.)

A quick explanation of the Cloud Storage Service is that it is for cases when two or more users install the Standard version of DONATION on their computers, and want to share the same database across the Internet. The official copy of the database is always an encrypted Internet backup stored on the Software4Nonprofits server. When you start DONATION with the Cloud Storage Service turned on, you are prompted for the encryption password, then the program "takes control" of the database, downloads the latest Internet backup to their computer, and restores it. You do the work on your computer, then when you exit DONATION, the program uploads a backup of the database back to the Internet storage, and "releases control".

When any one user has control, no other user can get control and do editing. However, they can still get an up-to-date copy of the database (up to the point where the first user started using it) and access it read-only. This prevents the sort of problems that can come up with the manual methods for transferring backups back and forth in "Transfer your Data between Computers", if the users don't keep track of who has control of the database.

If you were the last user to upload the database to the server, when you next run DONATION it doesn't waste time downloading it again, it just takes control and uses your existing database. And if you don't make any real changes to data during your run of DONATION, it doesn't waste time uploading a backup to the server again.

We should note that "take control" and "release control" are sort of metaphors - an easy way to understand what is going on. Other metaphors that might be helpful are the concept of having a reservation to use the database, and releasing that reservation. Or, for anyone with computer programming experience, checking out the database and then checking it back in.

This service is not available with the [Local Network](#) or [OnDemand](#) versions of DONATION, because they use a completely different way of sharing just one database file.



It is only recommended that you use this service if every computer running DONATION and sharing the same database has extremely reliable high-speed Internet. If your Internet goes down a lot on one or more of your computers, you could easily lose work when using this service.

This service has some of the advantages of traditional web-based (also called cloud-based) software run through web browsers. Namely, all users are accessing essentially the same copy of the database, which is stored on a server. However, it does not share a significant disadvantage of web-based software, which is that every access to the program's data has to be transmitted through the Internet, slowing them down significantly. We see that as a real issue for web-based programs doing things similar to what DONATION does, which more than anything else are used to do data entry. Of course, unlike most web-based software, only one computer can make changes to the database at a time when you use this service.

The only delays with the Cloud Storage Service are the downloading and uploading of your backup when you start and exit the program. The encrypted backup databases that are transferred are also compressed, to make them significantly smaller and faster to transmit over the Internet.

The security of this system is basically the same as that for Internet backups. (See [Internet Backup Security](#) for details.). For someone to access your data, they would have to either know your Unique ID for Internet backups, or have a copy of your database or one of its backups, and they would also have to know the strong password that you choose to use for the encryption of those backups. We have no ability to access your data unless you choose to give us both that Unique ID and the encryption password, or intentionally email us a database backup as part of a difficult to fix support problem.

### Turning the Service On

This is turned on for your first computer by first setting up Internet Backups in the **Backup/Restore ⇒ Backup Frequency and Options** [window](#), and then checking the **Use the Cloud Storage Service** checkbox. You will also have to fill in an email address in the field "Your Email Address for Cloud Storage Notifications", which should be different for each user/computer using the program. See the Help on that window for details.

Part of setting up Internet Backups is choosing a strong Internet Backup Encryption Password, that will have to be communicated to all users. If your organization has Limited, Read Only or Donors Only users with their own password, the Internet Backup Encryption Password should be different from the Program Entry Password used for full users. If you have no such limited users, you can also set the Program Entry Password to be the same as the Internet Backup Encryption Password, so that you only have to enter one password as you start the program. See [Passwords in the Program](#) for more details.

If you have already been transferring copies of your database between multiple installations of DONATION, or otherwise already have copies of the same database on multiple computers, be sure that you have the most up to date database first on the computer on which you first turn this service on, because it will then become the "official" copy when you exit the program.

Once you save that change, the service is turned on.

### Sharing the Database with Other Users

To get the same change to other computers running DONATION, so that they are safely sharing the database with you, after you exit DONATION (which uploads the first Internet backup file), the safest approach is to restore any backup made from the first computer after Cloud Storage was turned on, to each other computer. See [Transfer your Data between Computers](#) for the various ways that can be done.

To add a user on a computer that doesn't have DONATION installed yet, just download and install the Standard version on that computer, from the [DOWNLOAD](#) page on the website, and restore a current backup as part of the [initial startup](#).

### Your Email Address for Cloud Storage Notifications

If you already have the Cloud Storage Service turned on in an earlier release than 4.23, and start the program in release 4.23 or higher for the first time, or you are a new user joining the Cloud Storage Service, you will be prompted to enter "Your Email Address for Cloud Storage notifications". That should be an email address unique to this computer (and presumably to the user who most commonly uses it) that the service can use for sending emails to you in certain circumstances. (Specifically, it will send you an email if you have somehow kept control of the database for over 18 hours, and another user accepts an option to break that control.)

If you also have [multiple databases](#) on your computer for which you use the Cloud Storage Service, the program will assume that you want to use the same email address for notifications for all of them. If you want a different email address to be used for one of them, you can go to the **Backup/Restore** = **Backup Frequency and Options** [window](#) when you are switched into that database, and enter a different email address there.

### WARNING: The Program will Exit after Two Hours of Inactivity

Because no other user can get control of the database while you have control, you should exit DONATION when you are not using it. If you are using the Cloud Storage Service and you leave DONATION running for two hours without doing anything in it, it will automatically save your changes back to the cloud storage, release the control, and exit the program, so that others can use it. The program will of course tell you it has done that.

Please note that this automatic exiting after two hours of inactivity will also abandon any unsaved changes to a donor or a donation on the main window. So you should never leave the program alone for that long when you are in the middle of unsaved data entry! It will not exit, and thus abandon unsaved work, if you are in the Batch Entry window.

### Troubleshooting Potential Problems and Situations

Of course because this service is Internet based, and at times the Internet is not completely reliable, things can go wrong. It's very important to carefully read any error messages that come up in the use of this service, and respond appropriately. If you have read the messages carefully and still cannot understand what is going on, please [contact us](#) immediately for assistance, informing us of the exact text of the messages you are seeing and as much as you can about the situation. See [Screenshots](#) for the best way to do this.

You should also make other backups periodically, beyond the ones being made automatically by the service, by using other **Backup/Restore** menu options. Only the last 3 manual Internet or automated Cloud Storage Service backups are retained on the Software4Nonprofits server.

The following table covers some of the other issues you might run into.

Problem or Situation	Solution
Another user has control of the database when you go to start DONATION:	The program will allow you to run read-only in that case, so that you can still view data and run reports, but you cannot enter new data, edit existing data, create receipts, or do anything else that alters the database in any way. You will also be given an option at that point of bringing down the latest backup from the server before you start running read-only.
Another user has had control for over 18 hours:	This will most likely indicate that something went wrong and the other user was unable to upload their database and release their control. If you are sure that is the case, you can accept the option that the program gives you to take over control from them, and continue with whatever was the latest backup on the server. This will mean that the other user's work from that session that was not exited properly will probably be lost. The other user will also receive an email about this if you do break their control.
You want to change your encryption password:	Use the new <b>Maintenance ⇒ Change Password ⇒ Internet Backup Encryption Password</b> menu option to change it. Be sure to inform all other users to immediately start using that new password the next time they run the program.
You use a Program Entry Password, and don't want to have to enter both it and the Encryption Password whenever you start DONATION:	You can make them both the same, in which case only the Program Entry Password will be prompted for. However, this means they will both have to be strong passwords as required for Internet Encryption passwords (at least 8 characters, including 3 of the four types: small letters, capital letters, numbers, and symbols). In addition, if you also set up a Read-Only or Limited User password, it doesn't make sense for the Program Entry and Encryption passwords to be the same, because then your read-only or limited users, who still need to use the Encryption password when they start the program, will actually know the Program Entry Password, because it's the same! (The program may stop you from making them the same in that case, but whether it notices and stops you depends on the order in which you set the passwords up.)
Everyone forgets the Encryption Password:	On the computer on which you believe the most current copy of the database is present, just type in a different encryption password when you are prompted for it. The program will give you an option to change to that new password, and other options after that including one to have your current database become the new official one that is then uploaded when you exit. (Since you don't know the old password, there is no way you could download the current one from the server.)

You use the same Program Entry and Encryption password, and everyone forgets both:	You will need to contact us to get a reset of your Program Entry Password, which will get you into the program. Then you are in the same situation as in the previous point about forgetting the Encryption Password.
Someone else has changed the Encryption password and failed to tell you:	When you start up with the old Encryption password, it will fail, and give you some options. The best solution for you is to find out what the new password is from the other user, and use it! If that is impossible, one of the options the program gives you is to continue using the password you enter, and your current database, without downloading anything. Your current database then becomes the official one when you exit.
The program is telling you that you are using a different Encryption password from the last time.	This can be because of what's in the previous row of this table (someone else changed the password) or because you accidentally changed it the last time you used it, and are now using an older password (which may or may not be the correct one). Just decide whether what you entered is correct, or whether you need to change to a different one (for instance if another user changed it, and you want to stick with their change) and answer the questions the program asks appropriately. Answer Yes to the messagebox that comes up to stick with what you entered, or No to try again with a different password.
All computers running DONATION die, and you don't know how to regain access to your data:	When you first set up Internet Backups (required prior to turning on the Cloud Storage Solution) you were prompted to both print off and email to Software4Nonprofits the Unique ID for Internet Backups. If you have done one or both of those things, you can resume using those backups by re-installing DONATION on new computers, and restoring the latest backup using that Unique ID and your Encryption password. (We can tell you the Unique ID if you don't have the printout, but did email it to us. You do have to know the Encryption password - we cannot recover it.)
You want to stop using the Cloud Storage Service:	Just turn it off, on all computers running DONATION, through the <b>Backup/Restore</b> ⇒ <b>Backup Frequency and Options</b> <a href="#">window</a> , and then go back to some other method of sharing your database, if you still need DONATION on multiple computers. If you cannot turn it off because your database is coming up read only because you cannot successfully connect to the cloud storage service, one work-around is to download and install the Local Network Server version from the DOWNLOAD page on the website, <a href="https://software4nonprofits.com/download-all/">https://software4nonprofits.com/download-all/</a> , on top of what you have now, then run it, which gives a message saying that cloud storage isn't allowed with that version and it will be turned off. (You can ignore the message, when you run the Local Network Server, that you aren't licensed for it.) Then download and install the Standard version again, on top of what you have now, and cloud storage will still be turned off.
Your Internet is down when you want to start DONATION:	You will be given three options: to get the Internet connection up and and try again, to exit the program, or to run read-only.

Your Internet is down when you go to exit DONATION:	You will not be able to upload the backup or release the control. Get your Internet connection working again, then restart DONATION, make any sort of change to your data, and exit it again, in order to do the upload and release the control.
You enter the program with a <a href="#">Limited User</a> password:	The Cloud Storage Service works normally, and you have the normal limitations of such users.
You enter the program with a <a href="#">Read Only</a> password:	The Cloud Storage Service gives you an option to download the latest backup for you when you start, but it doesn't bother uploading when you exit, since you could not have changed anything. Also, you do not take control of the server database, so other users can run at the same time.
You use multiple databases with the <b>Database</b> ⇒ <b>Switch Databases</b> <a href="#">menu option</a> :	Each database can have its own Cloud Storage (or not). When you switch from a database that has the service turned on to another one, the program first behaves as if you were exiting, by uploading the backup and releasing the control. Then it starts up on the new database, as if you were entering the program, taking control and downloading the backup (assuming that database also has Cloud Storage turned on, of course).
Your computers have become out of synchronization with each other.	<p>This can happen very occasionally if something goes wrong, where the Cloud Storage Service seems to be working but the computers aren't synchronizing properly, so one of them has newer data than the other(s).</p> <p>The best solution is to actually copy the database file from the one with the most up-to-date data to the other computer. That file lives in the Data subdirectory of the program's <a href="#">Data Directory</a>, and its name is DONATION4.DB (unless you are <a href="#">Switching Databases</a>, in which case the extension may be different from ".DB", depending on which your databases is having the problem).</p> <p>Note: Both when you are copying the database out of one computer (either to a USB memory key, or to attach it to an email) and when you are copying it back onto other computers, you cannot be running DONATION at the same time.</p>

## 23.9 Restoring Non-Backup Databases

On occasion, users need to reinstall DONATION (for example after a hard drive crash) and they have a copy of the database file (normally named DONATION4.DB) but do not have an up-to-date database backup file (one with a filename ending in ".GBK"). This menu option allows you to recover in that case. (If you do have an up-to-date backup file with a name ending in ".GBK", use it instead, with the **Backup/Restore** ⇒ **Restore Database** [menu option](#).)

To do this, select **Backup/Restore** ⇒ **Restore Non-Backup Database**. It will prompt you with a "Restore Database Copy" dialog box, where you select the database file copy and the directory it is in. The file has to have the same name as your current database file. So if your database has the normal filename DONATION4.DB (which it will, unless you are using **Database** ⇒ **Switch Databases** to handle multiple databases), then the file to be restored

will also be named DONATION4.DB. Once you select the file to restore, just follow the prompts, and it will do the restore.

If you *are* using **Database** ⇒ **Switch Databases** to handle multiple databases, you can only restore a copy of the database that you are currently using. So if you are currently on a second database named DONATION4.OTHER, the file you would restore would also be named DONATION4.OTHER.

The restore is done by completely replacing your existing database file with a copy of the other file. Once this has been completed, it will restart the program so that it can use the newly restored database.

#### Restoring Older Backups

If you try to restore a non-backup database that is older than your current data (i.e. you have entered further donations, with later dates, than are in the database you have selected to restore), the program will give you a very explicit warning about this, and ask you twice to confirm that you really wish to do this. That's because doing such a restore will cause the more recent data, entered since that earlier database, to be lost!

#### Restoring DONATION3.DB Backup Files from Previous Versions of DONATION

Database backups made with versions of DONATION prior to version 3.00 (which was released in late 2007) can not be restored directly to version 3.00 or later using **Backup/Restore** ⇒ **Restore Database**, or by double-clicking on them, because a different database format was used. If you need to restore a previous-version backup (for example a file named DONATION3.DB) please [contact us](#) for assistance.

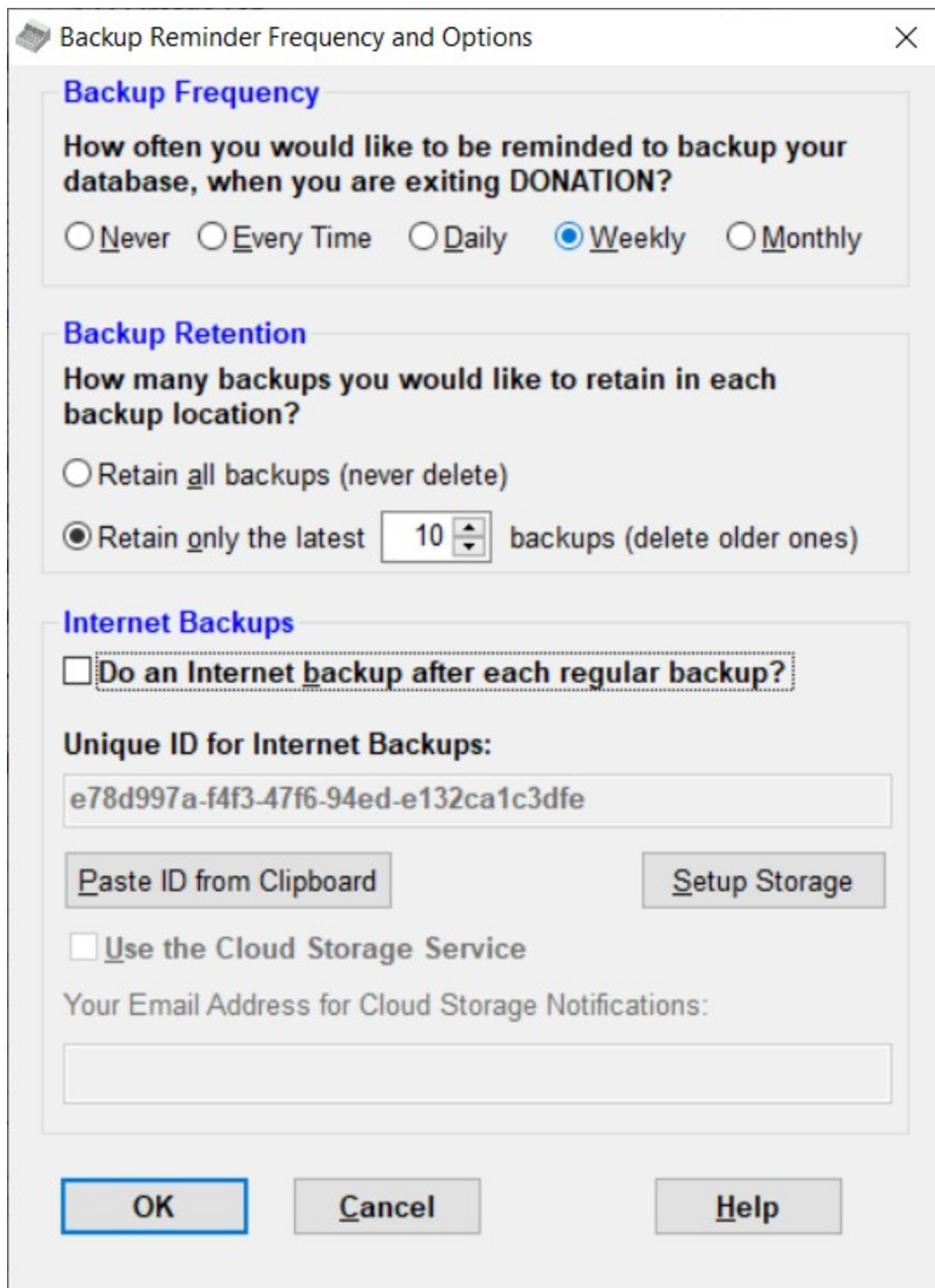
#### Restoring for users of the Local Network Version

Only a user on the computer that has the [Local Network Server](#) version installed on it can do restores. Users of the Local Network Client version will receive a message explaining that they cannot do restores.

## 23.10 Setting Backup Reminder Frequency and Options

When you select the **Backup/Restore** ⇒ **Backup Frequency and Options** menu option, the following window appears:





**Backup Reminder Frequency and Options**

**Backup Frequency**

How often you would like to be reminded to backup your database, when you are exiting DONATION?

☐ Never ☐ Every Time ☐ Daily ☒ Weekly ☐ Monthly

**Backup Retention**

How many backups you would like to retain in each backup location?

☐ Retain all backups (never delete)

☒ Retain only the latest  backups (delete older ones)

**Internet Backups**

☐ Do an Internet backup after each regular backup?

**Unique ID for Internet Backups:**

☐ Use the Cloud Storage Service

Your Email Address for Cloud Storage Notifications:

By default, the program reminds you weekly to backup your database, as you are exiting the program. If you wish to be reminded with a different frequency, you can use the radio buttons in the top section of this window. They give you the option of Never, Every Time, Daily, Weekly, or Monthly. If you don't set it, it defaults to Weekly. If you enable the Cloud Storage Service (described [below](#)), only the frequencies Weekly and Monthly will cause these



reminders to do regular backups as you exit the program - Every Time or Daily are superseded by the fact that the Cloud Storage Service backs up every time for you.

Unless you are using the Local Network Client Version of DONATION, and a different user (probably the one whose computer is running the Local Network Server Version of DONATION) is definitely making regular backups, it is **strongly** recommended that you do **not** select the option Never.

**If you are not making regular backups off of your hard drive (and someone else or some automated process is not doing so), you might as well not be using the program - there is real possibility that your hard drive and/or computer will die at some point, and you will then have no data!**

If you have not done a backup within the configured period of time (with either **Backup/Restore = Backup Database** or the **Backup/Restore = Email Backup** [option](#)), you will be prompted to do a backup the next time you exit the program. If you select the option "Every Time", you will be prompted to backup the database every time you exit the program, even if you have already made a backup during that run.

The next section governs how many sequential backups are stored in any one backup destination, such as a folder on your hard drive, or a USB memory key. Backup files in current versions of DONATION include the date and time in their filename, for instance DONATION-2015-12-31.15.30.30.DB.GBK for a backup made on December 31, 2015 at 3:30pm. So normally, backups done on different days and times have different filenames, and they will accumulate in whichever folder or drive you are saving them in.

To let those backups accumulate indefinitely, select the "Retain all backups (never delete)" radio button. To only keep a certain number of the latest backups you have made, use the "Retain only the latest" radio button, and set a number in the field following that. (You can only change that number after you have selected "Retain only the latest".) Allowable values in that field for the number of backups to retain range from 3 (fewer would be unsafe!) to 20. If you think you want more than 20 backups to be retained, just use the "Retain all backups" option instead!

**Trick:** If you are making a backup and don't want it to be deleted by the "Retain only the latest" option, perhaps a year-end backup, change the backup filename as you are making the backup to not start with "DONATION". For instance, you might call it "2015YearEndDONATION-2015-12-31.12.00.00.DB.GBK (or whatever the actual date and time is on which you are making the backup). When the "Retain only the latest" option is turned on, only old backups whose name starts with "DONATION" will be deleted.

Note: The setting to retain only some latest number of backups does not apply (and thus cannot be set!) for the [Local Network Client](#) version of DONATION, because it cannot "see" the other backups on the Local Network Server Version's computer, in order to decide which to delete. (And it couldn't delete them either.)

### Configuring Internet Backups

The first set of controls at the bottom of the window determine whether or not a backup to a secure Internet location is made after every regular backup. The "Do an Internet backup after each regular backup" checkbox starts out unchecked, in which case none of the buttons below it can be used. If you do wish to do [Internet Backups](#), check that checkbox.

After checking the "Do an Internet backup after each regular backup" checkbox, if you do not already have a Unique ID for Internet Backups, which in many cases you will, it will be created for you. To ensure that they are unique, so that your backups don't get mixed up with any other organization's backups, you cannot simply type it into that field yourself. Instead, if this is the first time you or your organization have made Internet backups for this database, as mentioned it will be created for you.

If you are [moving](#) DONATION to a new computer, and don't have a local backup but rather want to [restore](#) your latest Internet backup in order to get a copy of the database, you may have been sent the Unique ID in an email. In that case, copy it to the Windows clipboard (by highlighting it in that email with your mouse and pressing Ctrl+C, i.e. hold down Ctrl and press C), then click the **Paste ID from Clipboard** button in this window to paste it into the field.

Finally, once you have your Unique ID you need to click the **Setup Storage** button to set up a secure storage area in the Internet storage for backups, associated with your Unique ID, and a with a password that you will be prompted for. For greater security, the password you enter must be a [strong password](#).

**Note: There is no way to recover your Internet backup password if you forget it**, so please be sure that multiple people in your organization know what it is.

To help ensure that you cannot lose your Unique ID, two additional steps are taken by the **Setup Storage** button, after the basic setup has been completed. First, you are prompted with an option to email your Unique ID (but not your password!) to Software4Nonprofits, for safe storage. That way if you lose everything else (but at least know your Internet backup password), we can supply the Unique ID back to you, and you can recover your latest Internet backup. A copy of that email will also be sent back to you, so you can forward it to others in your organization, for safe keeping.

After that email is (optionally) sent, a report is displayed listing your Unique ID, and with a place on which you can write in your password, if you feel secure about doing so. Please Print that report, and keep copies of it in a safe place.

If you need to send that email or print that report again in the future, you can come back to this window and click the **Setup Storage** button again - it will not change the Unique ID.

You can also copy the Unique ID to the Windows clipboard by clicking into the field displaying it, and pressing **Ctrl+C**. That will show a message explaining that you can then paste that into an email with **Ctrl+V**. You might want to do this to send it to a new user who has also installed the program, to enable them to restore the latest Internet backup. You will also have to send them your Internet Backup Password (preferably in a separate email, for security).

Please note that Software4Nonprofits will not store your Internet backup password for you. If we did, our computers would become a potential place of attack for hackers trying to access all DONATION program users' databases, and that is not desirable!

#### Internet Backups when you have Multiple Databases

If you have multiple databases for multiple organizations, using the **Database ⇒ Switch Databases** [menu option](#), each one needs its own configuration for Online Backups, and will

have its own Unique ID and associated secure storage area. Do not copy and paste in the same Unique ID for all of them, or your backups could get mixed up!

#### Internet Backups when you have DONATION on Multiple Computers

Many users keep copies of DONATION on multiple computers, and [transfer their database](#) between those computers. (When you do this, you must be sure to keep track of who has the up-to-date copy, on which changes can be made, because changes made in two copies of your database cannot be merged!)

When you do have copies of the same DONATION database on multiple computers, you must be sure to use the same Unique ID for Internet backups and Internet backup encryption password in both databases. The Unique ID is stored in the database, so any method of transferring the database (other than restoring an Internet backup, prior to the configuration of the second computer!) after you complete your Internet backup setup will get the same Unique ID onto the other computer. That includes transferring regular backups on a USB memory key, or use [Email Backups](#).

Alternatively, you can forward the email with your Unique ID to the user on other computer, and have them copy it out of the email, and paste it in to this window with the **Paste ID from Clipboard** button. You also must inform them of the Internet backup encryption password you are using (but not in the same email - that's not very secure, to have both pieces of information in the same email!). They can then re-do the **Setup Storage** (which doesn't change anything, as long as it is done with the same password), and then they can [restore](#) your Internet backup.

#### Using the Cloud Storage Service

The final checkbox on this window, "Use the Cloud Storage Service", turns on that [Cloud Storage Service](#), which is an automated mechanism for using Internet backups to securely share your data between multiple computers running the Standard version of DONATION. Please be sure to carefully read that Help page for full details.

When you turn this checkbox on, you will no longer be prompted to make backups when you exit the program as specified at the top of this window if you set the frequency to Every Time or Daily, because the service normally does the backups every time you exit the program. You **will** still be prompted to make local backups at the specified frequency if you set that frequency to Weekly or Monthly, and in fact the program will suggest this to you if you don't do it yourself.

To complete the setup for using the Cloud Storage Service, you also have to enter "Your Email Address for Cloud Storage notifications". That should be an email address unique to this computer (and presumably to the user who most commonly uses it) that the service can use for sending emails to you in certain circumstances. (Specifically, it will send you an email if you have somehow kept control of the database for over 18 hours, and another user accepts an option to break that control.) If your email address changes (or the user of this computer changes) you can come back to this window to change this value.

If you have already been transferring copies of your database between multiple installations of DONATION, be sure that you have the most up to date database first on the computer on

which you first turn this service on, because it will then become the "official" copy when you exit the program.

Turning on the Cloud Storage Service disables the other controls about Internet Backups, because making any changes there would inappropriately affect the Cloud Storage Service. So among other things, you cannot turn off Internet Backups when the Cloud Storage Service is on, because the service uses those Internet Backups. (If for some reason you need to turn both off, just turn the Cloud Storage Service off first.)

This service is not available with the [Local Network](#) or [OnDemand](#) versions of DONATION, because they use completely different ways of sharing just one database file. So you will not be allowed to turn on this checkbox if you are using any of those versions.

**See Also:** [Making Internet Backups](#), [Restoring Internet Backups](#), [Internet Backup Security](#), [Cloud Storage Service](#)

## 23.11 Passwords for Email and Internet Backups

When you are making [Email backups](#), you are prompted for a password. For better security, if you use too weak a password, you will be **recommended** to use a stronger one, based on the following rules.

Likewise, when you are or setting up, making or restoring [Internet backups](#), you will be **required** to use a strong password based on the following rules.

### These are the rules for a strong password:

- It must be at least 8 characters long.
- It must include characters from at least 3 of the following four groups: capital letters, small letters, numbers, and symbols (everything else). Note: This implies that passwords are case-sensitive, i.e. it matters whether each letter you use is entered as a capital or small letter.
- It cannot include any initial 4-letter sequence from any word in your Organization Name, Organization Name 2 or Receipting Person name from the **Maintenance** ⇒ **Organization Info** [window](#). (This check ignores the case of letters, for example if your Organization Name includes the word "Church", your password cannot contain "chur", "CHUR" etc.)
- It cannot include any initial 4-character sequence from a set of too-commonly used passwords, like "password", "qwerty", "1234" etc. Again, this check ignores the case of letters.
- It cannot start the same as your Unique ID for Internet Backups, which is not a password.

If any of these rules are violated by the password that you enter, you will be told exactly what the rule is that you violated, and given an option to re-enter the password. If you do not accept that option in the case of Email backups, your too-weak password will just be used. If you do not accept that option to re-enter the password in anything related to Internet backups, the action you were trying will be canceled,

Note: When you are prompted for a password for [restoring](#) an email backup, these checks are not done. That is because strong passwords are not mandatory for making email backups, so there is no point in trying to encourage you to use a strong password to restore an email backup, which may not have been made with a strong password in the first place!

Software4Nonprofits cannot reset Email backup or Internet backup passwords for you, or give you any way to access either of those types of backups if you forget your password. However, for the Internet backups, you can go back to the configuration in the **Backup/Restore ⇒ Backup Frequency and Options** [window](#), and click **Setup Storage** again to provide a new password, if you have forgotten the old one. That will allow you to resume making Internet backups, but it will not allow you to restore any previous Internet backups made with the password that you forgot.

Note: If you set up [multiple databases](#) for multiple organizations, any passwords that you set up are specific to each database.

## 23.12 Internet Backup Security

If you make [Internet Backups](#) (including doing so with the [Cloud Storage Service](#)), they are stored in a secure location on the Software4Nonprofits.com web server. All access to them is through the https protocol, which is encrypted, and is the same secure protocol used for online banking etc.

Your Internet backups are protected by your Unique ID (set in the **Backup/Restore ⇒ Backup Frequency and Options** [window](#)), plus many levels of secret techniques and strong encryption, but ultimately the final level of security will always depend on the encryption password you select for your Internet backups. That is why [strong passwords](#) are required for Internet backups.

No security method is 100% unbreakable. Having said that, it would require a very determined and extremely highly skilled hacker to break through all of the levels of security built into the Internet backup and restore features in DONATION and be able to get access to your backup files. But even after doing that, they would still have to guess your encryption password in order to be able to see your data.

Because no extremely valuable information like credit card numbers is stored in the DONATION database (or at least, you should not be doing so!) there is also probably very little incentive for high-level hackers to try to get at your data.

For those users who are in Canada and are concerned about implications of our privacy laws on whether you are allowed to transmit sensitive information out of the country, the Software4Nonprofits.com web server is also in Canada, so that is not an issue.

If anyone wants to know more of the details of what makes the Internet backups and restores secure, you can [contact us](#) for further information. (We will not disclose all of the secret details that add to the security, of course, but we can give some further details, if you feel you need them, to reassure you.)

## 24 THE REMOTE DATABASE VERSION

### 24.1 The Remote Database Version

The Remote Database Version (previously called the Web Network Version) was discontinued on August 1, 2021. This version had the program on your computer, and your database on our server. It allowed for multiple simultaneous users.

Having to communicate with the database over the Internet made this version rather slow. Better alternatives that are still available are the [OnDemand](#) version, and the Standard version using its [Cloud Storage Service](#) for sharing.

## 25 THE ONDEMAND VERSION

### 25.1 Overview

Some users may wish to use DONATION from two or more computers (for instance, one at work and one at home) and have access to the same database from those computers. This could be for themselves, or for different people.

The cloud-based OnDemand Version, introduced in late 2020, is an excellent way to do that.

Unlike all other versions of DONATION, the OnDemand version can also be run on Apple Macintosh (Mac) computers, though it will still look like a Windows program. It can also be run, for limited uses, on Android and iOS (iPad) tablets.

There are also several other options for multiple users accessing DONATION, detailed on the [Multiple User Options](#) page, with pros and cons for each option, including the Standard version's [Cloud Storage Service](#), and the [Local Network Versions](#).

This page is only about the OnDemand Version.

With this version, you do not have to install the DONATION program itself on your computer. Rather than installing the program, you install a small OnDemand client program. The DONATION program and your database are stored on servers ("in the cloud"). The client program will securely access the DONATION program and your database directly over the Internet, via remote control.

Screen images and your keyboard actions and mouse movements are transmitted over the Internet with this version, so it will be a bit slower than fully local versions like the Standard and Local Network versions. You should only consider this version if you have reliable fairly high-speed Internet.

**Technical details on required Internet speed:** Most users will not need to read this, but we are providing it for more technical readers in case you are interested.

We have been given the following details by ACS Technologies, who run the OnDemand servers:

OnDemand requires a response within 500 ms or 1/2 of a second. If the Internet lag time exceeds this limit, the connection can be lost, and the session will be disconnected. Below is a guide which outlines the number of concurrent users who can be supported at various broadband speeds when only OnDemand is running:

Users	1	10	25	50	100	200
Kbps Upload/Download	30	300	750	1500	3000	6000
Mbps Upload/Download	0.03	0.3	0.75	1.5	3.0	6.0



At the absolute minimum, the bandwidth for uploading and downloading must not be less than 30 Kbps per concurrent user. Ideally, your ISP's advertised connection speed should be significantly greater in order to keep users from being dropped during peak Internet times. Also, note that upload speed is equally important as download speed when using OnDemand.

We cannot guarantee that any particular DSL or cable connection to the Internet will perform satisfactorily due to the countless factors that may affect and degrade the performance of your connection.

ACS Technologies does not support OnDemand using a satellite broadband service. We have found that the latency in this service does not create a good experience.

This OnDemand technology is very similar to Citrix, Microsoft Remote Desktop and Remote Desktop Services (previously called Terminal Server), and other remote access solutions like TeamViewer, LogMeln and AnyDesk. Unlike some of those solutions, it allows for multiple simultaneous users of the same program and database, safely. While the OnDemand version of DONATION is not exactly web-based (it is not accessed through a web browser such as Edge, Internet Explorer or Chrome) it is the closest to a web-based application of any of the versions of DONATION, because you do not have to install the DONATION program itself.

The OnDemand servers that support this version of DONATION are maintained by the church software vendor [ACS Technologies](#) (ACST), with whom we have a partnership for sharing some technology such as this. We pay them for our OnDemand users. ACST are the makers of the church software programs Realm (an entirely web-based online program) and ACS Church Management (installed software, that is also available as an OnDemand version).

Each user of this version for a given organization will have their own user name and password required to access the database.

Like the Local Network version, with this version there is only one copy of the database file, so there are no real dangers of users making independent changes to independent copies of it, that cannot then be merged. (The Cloud Storage Service of the Standard version also eliminates that danger, though in a different way.) The OnDemand Version is accessible from any computer on which you have installed the small client program.

#### Pricing Issues

The OnDemand Version of DONATION has the same price as the Local Network Version, which is higher than the price of the regular Standard version, because they all allow you to have multiple users doing data entry simultaneously (at exactly the same time). We have to pay a significant monthly cost for each simultaneous user of the OnDemand version, across all organizations using it, which is another reason for the higher price.

Like all other current versions except for legacy [Lite](#), Annual renewals are required to keep using your OnDemand program after the first year. If you do not pay your Annual Fee when your current annual support expires, you will lose access to your database until you pay again, after a 30-day grace period.

Like all other versions, the first user to start DONATION after you have made a payment will have to request an updated license key, so that the program knows your payments are up to

date. (It may also be automatically retrieved for you, rather than you having to request it and wait for us to send it to you.)

### Backups

Backups are routinely made by ACST of all of the contents of the remote servers, to protect against hardware failures etc. However, you should not depend on them for backups of your database - that is still your responsibility. You should set up a backup reminder frequency in the **Backup/Restore** ⇒ **Backup Frequency and Options** [window](#).

Because your database is already stored on a server that is routinely backed up, the Internet Backups feature is not needed and so is not included in the OnDemand version. (All that feature would do would be to save it on a 2nd server.) With this version, it is perfectly all right to just save your backups to the Backup subdirectory of your [Data Directory](#) (which is the initial default location you are prompted to save to). Other versions prompt you to save backups off of your hard drive, for instance to a USB memory key, in case your hard drive dies.

### Updates to the Program

Unlike all other versions of DONATION, you do not have to either install or update the DONATION program itself on your computer. We will ensure that the program is updated regularly on the server when we do new releases with improved features and/or bug fixes.

### Login and Startup

As mentioned above, each user from an organization using the OnDemand Version will have their own login. Please see [OnDemand Version Login and Setup](#) for how your program and its database are initially set up.

That section also explains potential problems connecting to the server, particularly about [firewalls](#).

### Conversion from Previous Versions of DONATION

To switch to the OnDemand version from any other version of DONATION, you will have to first contact us and give us the contact information for a person who should be the Site Administrator of your users for the OnDemand version. Usually that will be the main user of the program, but it could alternatively be someone who doesn't routinely use the program but who you still want to do that administration. Further Site Administrators can be added later.

We will then have an OnDemand login set up for that Site Administrator. They can then download and install the OnDemand client from our web page <https://software4nonprofits.com/pricing/donation-cloud/#step-2>. After running that client program, they will be able to use a User Maintenance application to set up further user logins, and specify whether each of those users is also a Site Administrator.

The Site Administrator can then run DONATION via the OnDemand client. Please see [OnDemand Version Login and Initial Setup](#) for the rest of the details about what you do next.

**If one user in your organization is using the OnDemand Version, all users have to, or you will not be accessing the same copy of the database!**

### Managing Users and Logins

Each user of the OnDemand Version should have their own login user name and password. One slight complexity with the OnDemand version is that there are actually two places that users must be set up, and assigned appropriate permissions:

1. The OnDemand User Management application (not part of DONATION), which allows any Site Administrator to set up logins, and determine who is a Site Administrator in that application itself. It also allows the Site Administrator to determine which Software4Nonprofits programs each user has access to, for our customers who own both DONATION and ACCOUNTS.
2. The **Maintenance** ⇒ **Administer All Users** menu option in DONATION, which allows you to specify the permissions of each of those user logins, such as whether they are an Administrator with full permissions, a Full user (except for Administration), a Read Only user, Limited user, or Donors Only user.

See [OnDemand Version User Management](#) for full details on setting that all up and managing it.

### Printing and Saving to PDF

If you go to print reports, you will normally see two printers on the list - your local computer's default printer, and one called "Preview PDF (from *COMPUTERNAME*)", where *COMPUTERNAME* is replaced by the name of your local computer.

Using the "Preview PDF ..." printer will actually create a PDF with a filename such as "Job #2.PDF", which you are not prompted for, in your local computer's TEMP directory, and then display it in Acrobat Reader on your computer (as opposed to using Acrobat Reader on the OnDemand server). We recommend instead using the specific features in DONATION for [saving reports, receipts and letters to PDFs](#), which will generate them on the server, prompting for your desired filename as required, and display them (when necessary) using Acrobat Reader on the server. Those features we recommend using are the **Save PDF** and **Save As** buttons in reports and built-in receipts, and the **File** ⇒ **Save PDF** menu option (and associated toolbar button) when you are viewing mail-merge letters or receipts.

If you have additional real printers on your local computer that you need to be able to print to from your OnDemand DONATION program, please see the instructions at <https://wiki.acstechnologies.com/display/OnDemand/Setting+up+a+Printer+in+OnDemand> for setting them up. (The Windows instructions there actually have a step you won't need to do, namely picking Printers from the File menu, but it should be pretty obvious.) In brief, just select OnDemand Printing from the main OnDemand menu that comes up after you login, to get to the window where you can configure printers.

### Accessing the Data Directory, and Drives on your Own Computer

Your database and other files in your [data directory](#) will be on the S: drive under OnDemand, not on the C: drive as in all other versions.

You do have access to the drives (including plugged-in USB memory keys and mapped drives) on your own computer, when you are running the OnDemand version of DONATION. However, their drive letters will be changed.

Your computer's C: drive will show up as J: when you are using the OnDemand version. Any successive drive letters on your computer will come up on successive drive letters under OnDemand, so a USB on D: will show up as K: etc.

The access to the drives on your computer allows you to save exported files or reports, or make backups, to your own computer, and import files or restore backups from your own computer, etc.

Mapped drives on your computer, like Z:, will normally show up with their drive letter unchanged. However, if your computer has a drive mapped to S:, that could cause a conflict with the way your data directory is mapped to the S: drive, so please avoid that.

If you have any difficulty with any of that, please see our short video demonstrating how to access your computer's drives from OnDemand programs, [here](#).

### Security

Please see the [OnDemand Version Security](#) page.

### Users with Multiple Databases

With the OnDemand version you are allowed to use the **Database ⇒ Switch Databases** [menu option](#) and have multiple databases, at no additional charge, just like in the Standard and Local Network versions.

If you are switching from another version of the program and you already have multiple databases, please follow the relevant instructions in the Help topic [Move the Program from One Computer to Another](#) to get those additional databases into your OnDemand version.

However, if there really is just one main person using each database, who is different from the main person using each other database, and other users never (or only rarely) access that database, that is not the intention of our allowing this to be done at no extra charge. In that case, we would expect that the main user for each organization / database would [register](#) and pay for the program separately.

For instance, if one user uses DONATION for two organizations, but occasionally another user needs to look at both of those databases, or take over while the first user is away on vacation, that's fine.

But suppose you have one primary user using DONATION for one organization, and a different primary user using DONATION for another organization, with perhaps occasional switching places while one or the other is on vacation. If they have only one registration and payment, and they are using multiple databases through **Database ⇒ Switch Databases**, that would **not** be considered to be a reasonable application of our pricing structure. They should register and pay separately.

### Simultaneous Users and Limitations

With the OnDemand Version you are allowed up to 5 users simultaneously accessing the same DONATION database. When you are first evaluating the program (before you pay), only one user can use it at a time.

While you can have simultaneous users running DONATION, there are some actions in the program that can only be run when you are the only user running DONATION, because we have judged that there is too much danger of conflicting or inconsistent data being put into the database if more than one person tries to do the same actions at the same time. For instance, restoring database backups. In these cases, you will receive a message from the program informing you of why you cannot do that action at that time, and what you can do about that.

In addition, only one user at a time can be [creating receipts](#), or doing other **Receipt** menu options that can affect receipts, although other users can still be logged into DONATION at the same time. If you do have multiple users wanting to create individual receipts at the same time, please be careful to do your printing (or saving to PDF, or emailing) of those receipts as quickly as possible. It's only after you have done one of those actions, or exit the window viewing the receipts, that another user can do **Receipt** menu actions.

In some other cases, two or more users can do the same thing at the same time (for example creating or editing donors or donations on the main window), but in unusual circumstances, you may get an error message. For instance, suppose two users are simultaneously making an address change for the exact same donor. The first one who clicks Save will have their changes saved, but the second one will probably get a slightly technical-looking error message saying "Record changed between retrieve and update", and will not be able to save their changes. They will have to click Cancel to abandon their changes.

In the OnDemand Version, a Refresh button appears at the top right of the Donor List on the main window. Clicking that will reload the main window, to pick up changes made by other simultaneous users, for instance added or deleted donors, changes to donor names, changes to the lists of donor or donation categories, etc.

Although the DONATION program almost never crashes, if it does, or if a user running DONATION restarts or turns off their computer without exiting DONATION first or there is a power failure, a minor problem can occur. Any user on another computer that tries to run DONATION may get a message that the maximum number of simultaneous users has been exceeded, when it in fact hasn't. (That includes if only one simultaneous user is allowed!) That's because the copy of DONATION that crashed, or wasn't exited properly when its computer was restarted, didn't have a chance to notify the database server that it had exited, and thus the server thinks it is still using up one of your simultaneous users. Fortunately, this problem is easily resolved - wait two minutes and try again, and it will be OK, because indications in the server that any given simultaneous user is using DONATION are automatically cleared after two minutes.

Another similar problem that can happen if your entire computer crashes is that when you try to sign on to the OnDemand client again, it can say that your user is already logged in. (On OnDemand user name can only be logged in from one computer at a time.) That may require contacting us to clear that.

#### WARNING: The Program will Exit after Two Hours of Inactivity

Because you are using server resources, you should exit DONATION when you are not using it. If you are using the OnDemand Version and you leave DONATION running for two hours

without doing anything in it, it will automatically give you a message then exit the program, so that others can use it and you are no longer using up server resources.

Please note that this automatic exiting after two hours of inactivity will also abandon any unsaved changes to a donor or a donation on the main window. So you should never leave the program alone for that long when you are in the middle of unsaved data entry!

However, the program will not exit and abandon unsaved work if you are in the Batch Entry window.

**In addition, it is crucial that you exit the OnDemand Client program window as soon as you are finished using DONATION, because we are charged for each simultaneous user of the program across all organizations using the OnDemand version.** The program will actually give you a message each time you exit it, reminding you to do that.

#### Switching Back from the OnDemand Version to another Version

This is actually quite simple, and is basically done by following the instructions in the Help topic [Move the Program from One Computer to Another](#).

Please be sure to inform us if you have made this switch, so that we can turn off your access to the OnDemand version.

**See also:** [Differences between the OnDemand Version and all Other Versions](#), [OnDemand Version Troubleshooting](#)

## 25.2 Differences from Other Versions

Because in the OnDemand Version both the program and your data are on servers, there are actually a lot of differences between how things are organized with it than with other versions. However, the features are basically the same - you are not giving up anything by using OnDemand.

Here are the most significant differences, that users should be aware of - particularly users who have used other versions of DONATION before:

- You never have to install or upgrade the program, only the OnDemand Client program. We will ensure that DONATION is always kept up to date when there are new releases.
- You can run it on Apple Mac computers, and also (with limitations) on iOS (iPad) and Android tablets. Tablet use would only be recommended for quick look-ups and reports.
- It requires reasonably fast and reliable Internet access.
- It runs somewhat slower than the legacy Lite, Standard, and Local Network versions.
- Users log in to the OnDemand Client with a login user name and password, then they do not have to provide a password to get into the program. Your login determines your permissions / access level, so no separate passwords are needed to determine that.
- Users have to initially be set up in two places: the OnDemand User Management application, to give them a login to the OnDemand Client, and the program's **Maintenance = Administer All Users** [window](#), to assign their permissions / access level for DONATION.
- When you first start using the OnDemand version you will have to wait briefly for us to set it up for you. Normally this should take no more than one business day, often much faster.



- Like the Local Network version, there is only ever one copy of the program's database, and it does not have to be backed up and restored to other computers for other users to access it. (With the Standard version, such backing up and restoring is necessary for sharing between computers, but it can be safely automated with the [Cloud Storage Service](#).)
- The usual **Backup/Restore** [menu options](#) are still available, though, for other purposes, like making extra backups to your own computer, or restoring a backup to go back to an earlier version of the database, after you have done something that you need to undo.
- Initially the only printer you have access to is the default printer on your local computer. Additional printers can be added, if you have more than one.
- The [Data Directory](#) location is different from all other versions: It is always S:\Cooperstock Software\Donation.
- Unlike all other versions, all users for one organization share that same Data Directory. In all other versions, each user has to install the DONATION software on their computer and thus has their own copy of the Data Directory. Because of this, there are a number of related changes to ensure that one user's work does not interfere with another user's work, and that users can have their own settings:
  - Instead of some settings, that are personal choices, being stored in the file DONATION.INI in the Data Directory, each user has a file *USERNAME.INI* in the Data Directory that is used instead of DONATION.INI. (*USERNAME* here, and in the next few bullet points, is replaced by the User Name you logged in with.)
  - Instead of mail-merge letter and receipt templates that you are in the process of editing, and results of mail merges, being stored in a Letters subdirectory under the Data Directory, they are stored in a subdirectory named Letters.*USERNAME*. The actual templates, however, are always stored in the database and shared by all users, as with all other versions of the program.
  - Instead of putting temporary files in your computer's normal TEMP directory, whatever that is, they are stored in a Temp.*USERNAME* subdirectory under the Data Directory.
  - Similarly, Import and Export subdirectories of the Data Directory, used for some functions, are replaced by Import.*USERNAME* and Export.*USERNAME*.
- You can access your local Windows or Mac computer's drives, but they will come up as drive J: and later. So for Windows, your main drive C: will appear as J:, if you have a D: drive (likely a USB memory key) it will appear as K:, etc. Those drive letters can be used for reading and writing files, for instance if you want to save a database backup to your own computer's hard drive rather than just on the server.
- Although ACS Technologies, who supply the servers, make regular backups of everything on those servers, and have redundancies in case of hardware failures, you should not depend on only that for the security of your data. You should still do regular database backups, whether to the server, or to your local hard drive. Because the server is already on the Internet, there is no need for the program's special Internet Backups feature and it is therefore not available.
- Like the Local Network version, you can have multiple simultaneous users doing data entry at the same time.

## 25.3 Login and Initial Setup

Please read the OnDemand [Overview](#) section first, if you have not already done so, before reading this section.

### Initial Setup

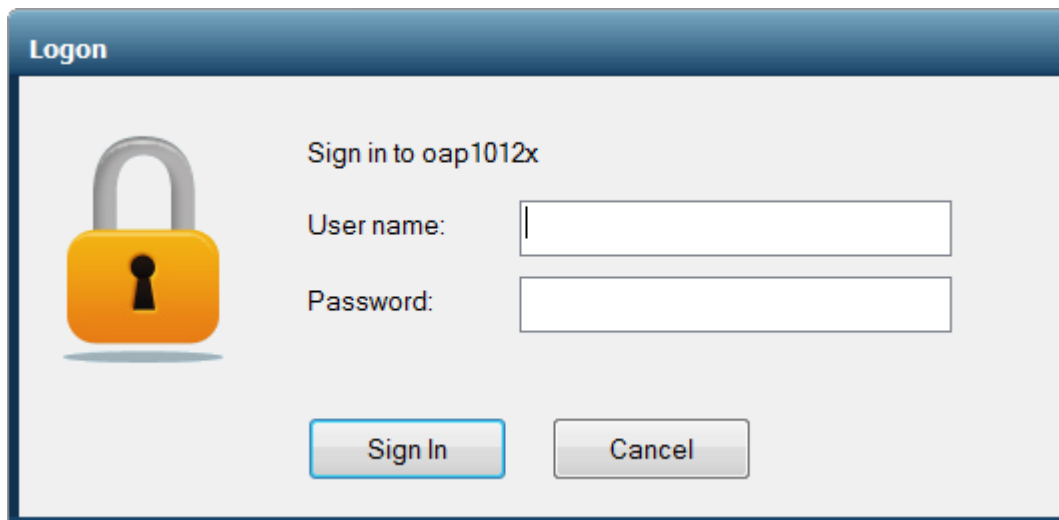


Before running the OnDemand version, you need to [contact us](#) and ask us to set up a user login for your initial Site Administrator for the system, who will be able to set up further users. That login information will be emailed to the Administrator, within one business day, but often faster.

Next, if you have an existing version of DONATION, run it and make a [database backup](#). Be sure you know where to find that backup.

For existing users of the [Remote Database](#) version, since that version has been discontinued and can no longer be run by users, you will have to [contact us](#) for assistance in moving its database to become your OnDemand database.

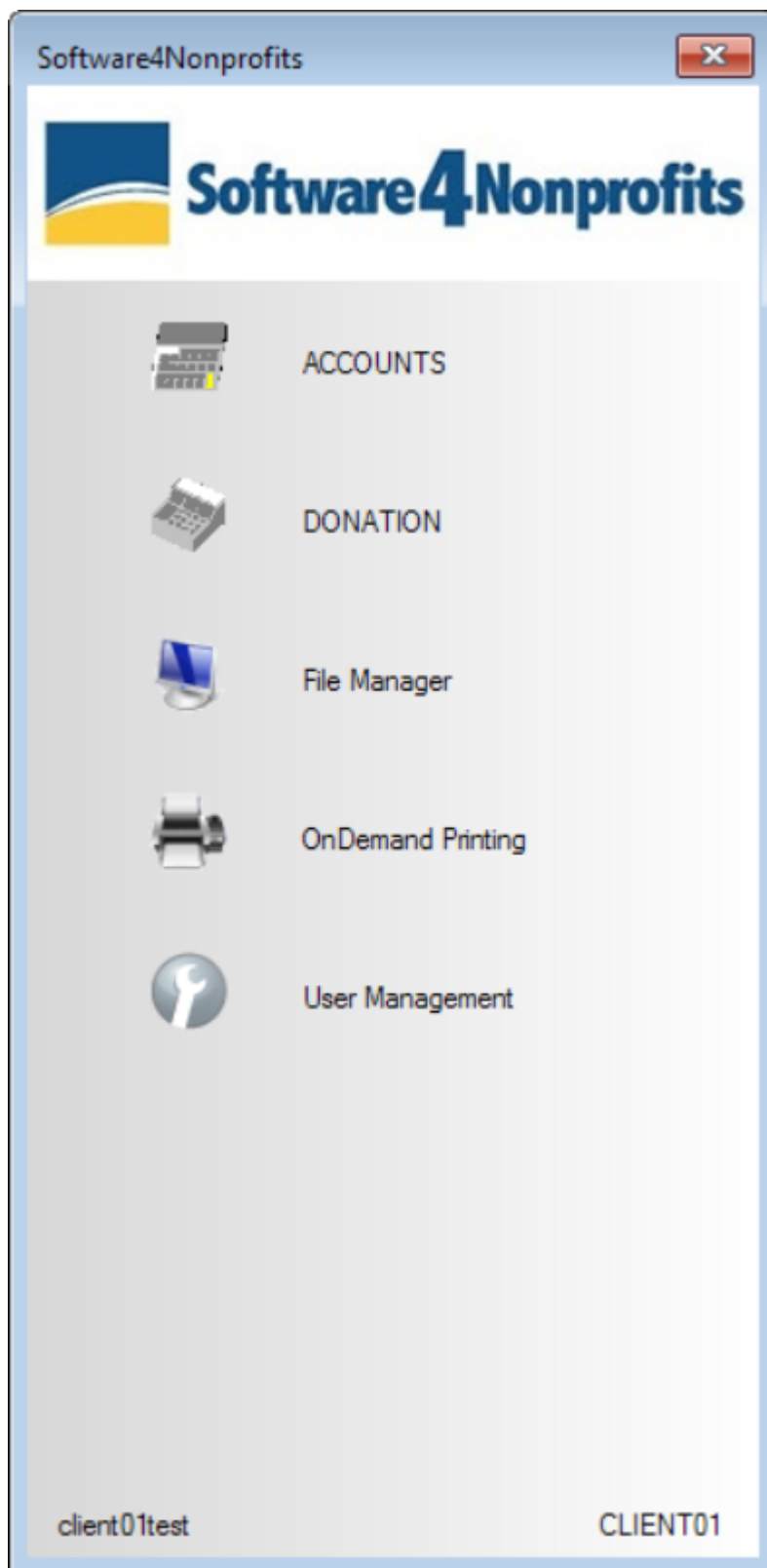
The Site Administrator can then download and install the OnDemand client from our web page <https://software4nonprofits.com/pricing/donation-cloud/#step-2>. After running that client program, they will login with the information that was sent to them, on a window such as the following:



Once a Site Administrator is logged in, they will be able to use a User Management application to set up further user logins, and specify whether each of those users is also a Site Administrator. See [OnDemand User Management](#) for full details.

If you feel that your computer is private and secure, and you want to avoid having to log in every time you start the OnDemand client, there are instructions on the [Command Line Arguments](#) page for adding your user name and password to the command line used for starting it. If you do that, you will have to change the command line arguments every 180 days, when the OnDemand system requires you to change your password.

Here is a sample of the window that will come up after your login:



Only Site Administrators will see the User Management application. Whether or not you see both DONATION and ACCOUNTS will depend on whether they have both been configured for you by the Administrator.

To start any program from the window above, double-click on its icon or name.

You can run DONATION via the icon in the OnDemand client window. The first time you do so, it will come up with the Initial Startup [window](#), like any first install of other versions of DONATION on a new computer.

If you are an entirely new user of DONATION (not switching from another version) just leave the first radio button checked ("I am a first time user ..."), click OK and follow the prompts to initialize your database.

If you are switching from another version of DONATION, choose the 2nd radio button option there ("I want to start by restoring a database backup ..."), and restore the database backup from your existing version, that you made above. (This is essentially like following the instructions in the Help topic [Move the Program from One Computer to Another](#).)

**Important:** When you are in the OnDemand DONATION, your computer's C: drive will show up as J:. Any further drives will come up on successive drive letters, so a USB on D: will show up as K: etc. So if you are restoring a backup, those modified drive letters are where you will have to navigate to, in order to find the file on your computer.

If you attempt to log in three times in a row unsuccessfully with the same email address, the login window will exit. **You can immediately start it again to try again - you are not locked out.** If you have forgotten your password, a Site Administrator can reset it for you - see [OnDemand User Management](#).

### **File Manager Application**

On the menu window, there is an icon for File Manager. That brings up a simple window designed specifically for copying files from the OnDemand server's directories (shown on the left) to drives and directories on your computer (shown on the right), or vice versa. It should be quite obvious how to use it, with drop-down lists for the drives that can be accessed and clearly labelled buttons and toolbars with popup tooltips. If you need more help with it, there is detailed help on the ACS Technologies website (addressed specifically to their own program, ACS, but also applicable to DONATION) at <https://wiki.acstechnologies.com/display/OnDemand/Transferring+Files>.

In addition, you can use the DONATION program's **Tools ⇒ Explore Data Directory** menu option to bring up a standard Windows 10 File Explorer window that you can use for copying files (as well as just looking around). It also has access to your computer's drives.

### **Converting from Competitors' Databases**

If you either don't have a previous local DONATION database with data in it, or choose not to upload that, but you do have a database from any of [Membership Plus](#), [GiftWorks](#), [Geminon](#), [PowerChurch Plus](#), [Roll Call](#), or Wincrafters [Church Assistant](#) on your computer, you will be able to convert or import them, but only after initially creating a new empty database by using the first radio button option on the startup options window.

You can then do any of the conversions from the competitors' databases listed above by using an appropriate option from the **Database** ⇒ **Import** [sub-menu](#).

### **Possible Connection Problem: Firewalls**

Some users may get an error message when they first try to use the OnDemand Version, saying "Failed to connect to connections.ondemand.acstechnologies.com on port 491.".

If that happens, please consult the following page about this problem on the ACST OnDemand website: <https://wiki.acstechnologies.com/display/OnDemand/Failed+to+connect+to+server>.

**See Also:** [OnDemand Version Overview](#)

## **25.4 User Management**

Please read the OnDemand [Overview](#) section first, if you have not already done so, before reading this section.

With the [OnDemand Version](#), each user of the program should have their own login user name and password.

The first user whose login has been set up by us is always the initial Site Administrator for the OnDemand User Management program. They can use that program to create logins for other users, who can optionally also be set to be Site Administrators for that OnDemand User Management program.

However, with the OnDemand version there are actually two places that users must be set up, and be assigned appropriate permissions:

1. First, the **User Management** application, accessed from the Software4Nonprofits menu window that comes up immediately after you log in - the same window from which you start DONATION.
2. Second, the **Maintenance** ⇒ **Administer All Users** menu option in the DONATION program itself, which allows you to specify the permissions of each of those user logins.

Full details about each of those places are given in the remainder of this Help topic.

The user names in the **Administer All Users** window in DONATION must be the same as the login user names set in the OnDemand **User Management** program. This provides what is known as a "single sign-in" capability, where you do not have to have separate logins for the OnDemand Client program and DONATION itself.

Each user in DONATION will have one of the following permissions (also called Access Levels):

- **User Admin w/ Full Access** (also called just "DONATION Administrator"): Can add, delete, and modify the permissions of other users, and use all features of the program (subject to the Receipt Password mentioned below).
- **Full**: Can use all features of the program (subject to the Receipt Password mentioned below), but is **not** an Administrator.

- **Limited:** The same as someone using the [Limited User Password](#) in other versions of the program.
- **Read Only:** can view data and reports, and create letters etc., but not change any data, generate receipts (other than sample ones) etc. The same as someone using the Read Only Password in other versions of the program.
- **Donor Only:** Can view and edit the donor information, but cannot see or change any financial information, including receipts. The same as someone using the Donor Only Password in other versions of the program.
- **No Access:** A user who has an OnDemand login to DONATION in an account that has multiple databases can be given this access level for any databases to which they should not have access.

See [Passwords in the Program](#) for more details about most of these permissions, which in other versions of the program are managed by separate passwords (but without using login names).

The same people do not have to be the OnDemand Site Administrators and the DONATION Administrators, but that will probably most often be the case.

The first user that actually starts the OnDemand version of DONATION for a given database is always automatically set up with User Admin w/ Full Access permissions (DONATION Administrator). Subsequent users who start the OnDemand version, if a DONATION Administrator had not previously set them up with a permission in **Maintenance** ⇒ **Administer All Users**, will be automatically set up as with Full permissions. That can be changed with that Maintenance window.

The only other issue about permissions is that the OnDemand Version also allows you to set up a Receipt Password with the menu option **Maintenance** ⇒ **Change Password** ⇒ **Receipt Password**. Full details are in the topic [Passwords in the Program](#). This can be used to restrict the generation of the receipts to someone that has this password. When this password has been set up, Full and Administrator users **cannot** create, reprint or delete receipts (except for sample receipts) in the program, unless they enter the Receipt Password when using a **Receipt** menu option that prompts for it.

### OnDemand User Management

Logins can be added or removed, and passwords can be changed, from the User Management application in the OnDemand client window that is displayed after your initial login - the same one you start DONATION from. Only OnDemand Site Administrators, who have been set up as such in that window, can use this application. It is recommended that you have at least two such Site Administrators, in case one is not available.

The User Management application also allows the Site Administrator to determine which Software4Nonprofits programs each user has access to, for our customers who own both DONATION and ACCOUNTS.

The same login information will be used for both programs, if you have access to both DONATION and ACCOUNTS.





Here is a sample of that User Management application's window:

The 'Users' window displays a table with the following data:

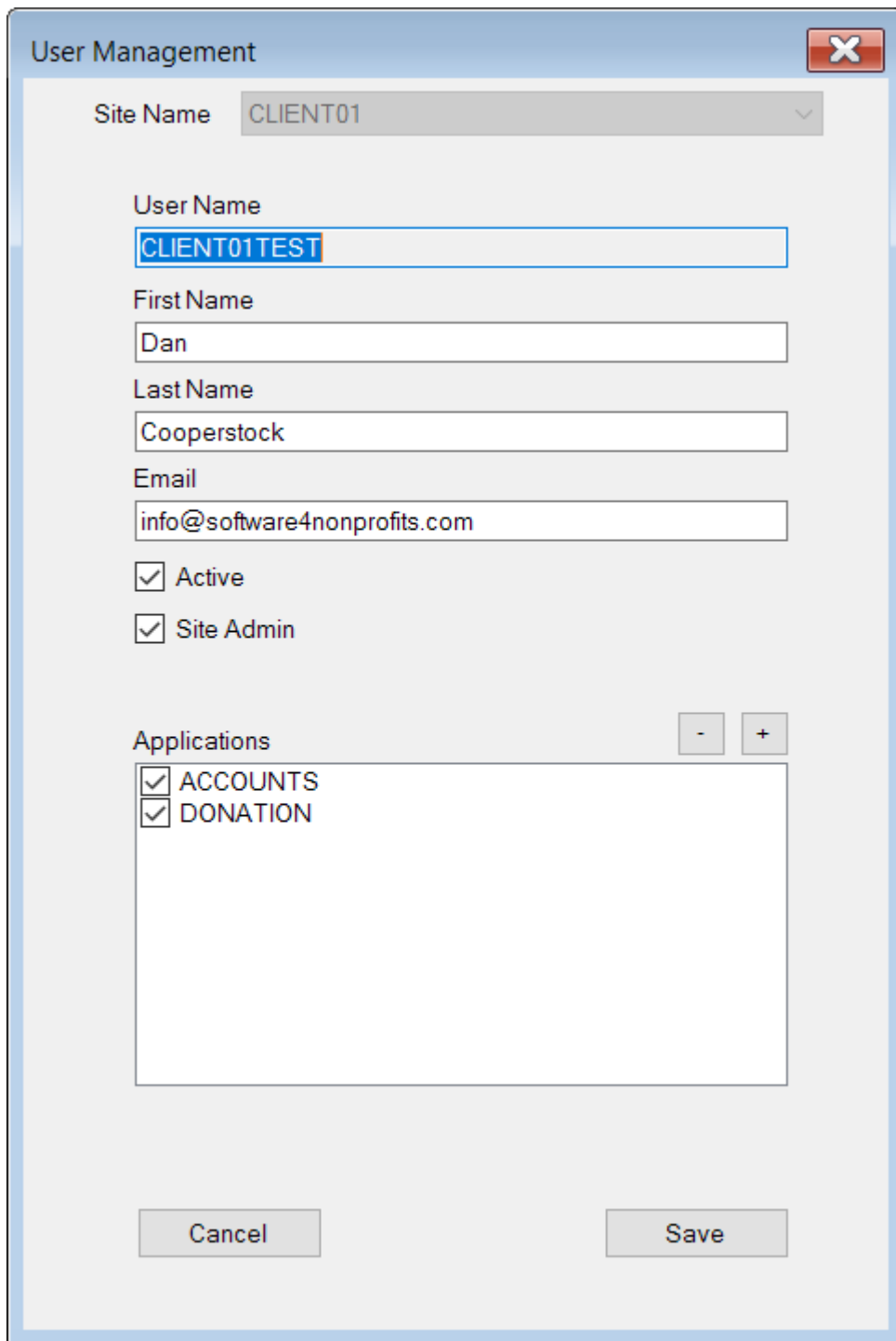
Site Name	User Name	First Name	Last Name	Active	Site Admin
CLIENT01	CLIENT01KWAME	Kwame	Barko	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CLIENT01	CLIENT01YIDA	Yida	Zhang	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CLIENT01	CLIENT01TEST	Dan	Cooperstock	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Below the table, it says 'Count 3'. On the right side of the window, there are four buttons: a plus sign (+), a pencil (edit), an 'X' (delete), and a circular arrow (reset).

On this window, any user names that have already been set up are in the spreadsheet-like grid. You cannot edit anything directly in the grid. Use the following buttons along the right edge of the window as follows:

Butt on	Action
	Click this to add a user and specify which Software4Nonprofits programs they can use. Enter their details in the window that comes up, then click the <b>Save</b> button. See below for more details.
	Click this to edit a selected user in a popup window, including changing which Applications they can access. You can also change the checkboxes for "Active" (whether they are currently allowed to log in) and "Site Admin" (whether they are a Site Administrator, able to use this User Management application) when you are adding or editing a user.
	Click this to delete a selected user.
	Click this to reset a selected user's password. This will inform you of the new password, and send an email to that user's displayed Email address on this window, to inform them of it. Just like when you add a new user, they will then have to change it to a password that they choose, after their first login using it.

Here's a sample of the window for editing or adding a new user:



The image shows a 'User Management' dialog box with a title bar containing a close button (X). The dialog contains the following fields and controls:

- Site Name:** A dropdown menu currently showing 'CLIENT01'.
- User Name:** A text input field containing 'CLIENT01TEST'.
- First Name:** A text input field containing 'Dan'.
- Last Name:** A text input field containing 'Cooperstock'.
- Email:** A text input field containing 'info@software4nonprofits.com'.
- Active:** A checked checkbox.
- Site Admin:** A checked checkbox.
- Applications:** A list box with two items, 'ACCOUNTS' and 'DONATION', both of which have checked checkboxes. To the right of the list box are two buttons: a minus sign (-) and a plus sign (+).
- Buttons:** At the bottom of the dialog are two buttons: 'Cancel' on the left and 'Save' on the right.

Here is the process when you add a new user with the  button and click **Save**:

- That will send an email to that user's Email address that you entered, to inform them of their password. It will come in an email from notifications@ondemandmail.com, with the Subject "Software4Nonprofits OnDemand New User Information".



- However, that email does not include their User Name for security reasons! You have to directly inform them of the User Name you give them, and where to find and install the OnDemand client program, using the Download Links at <https://software4nonprofits.com/pricing/donation-cloud/#step-2>.
- They will then have to change the password they were sent to a password that they choose, after their first login using it.
- User Names are not case-sensitive (so they can be entered in upper case, lower case, or any combination) but passwords are case-sensitive (they have to be entered in the exact case they were supplied, or entered when you change them).

Additional Help on this User Management window can be found online in the [OnDemand Site Administrator's Guide](#), so it will not be repeated here. Please keep in mind, however, that parts of the Help there will be referring to programs from ACS Technologies (the company supplying us with the OnDemand services) rather than referring to Software4Nonprofits programs. But the ideas are all the same.

Software4Nonprofits can also access the User Management application if you get stuck. For instance, if there is only one user set up and they forget their password, we can go in and do a password reset for them.

#### OnDemand Login Passwords

You will be assigned a password when you are initially given your User Name for logging in to the On Demand client. The first time you use it, you will be prompted to change it. You will also be prompted to change it every 180 days. Limitations on what can go into the passwords are explained at <https://wiki.acstechnologies.com/display/OnDemand/Complex+Passwords>.

If you have forgotten your password, you will have to ask your Site Administrator to reset it for you.

**Note:** You cannot change your own password, other than when the system prompts you to do so. If you do need to change your password, any other OnDemand user from your organization who is set up as a Site Admin can do so for you. That's one good reason to make sure you have at least 2 users set up, and that at least 2 of them are Site Admins. If that is not an option, we can reset your password for you, but we would ask you to have another user from your organization do so for you if at all possible.

#### Administering all DONATION Users

Any user who is a DONATION Administrator for the current database they are logged into can use the menu option **Maintenance ⇒ Administer All Users** to bring up the following window in which they can add users, delete users, change users's Access Levels (permissions) and change other fields:

Username	Full Name	Email Address	Access Level	Last Active	
DCOOP	Dan Cooperstock	info@software4nonprofits.com	User Admin w/ Full Access	01/27/2021	Delete
USER2	Mr. User Two		Full		Delete

Buttons: New, Save, Cancel, Help, Close

Any other user who is not a DONATION Administrator can open this window to view the information in it, but cannot make changes in it.

You can change any of the displayed data in this window, except for the Last Active date, which is a record of when that user last logged into DONATION. The Full Name and Email Address fields are only for your own information, and do not have to be filled in.

You **cannot** change things so that there are **no** Administrators (people with the Access Level "User Admin w/ Full Access"). You **are** allowed to have multiple Administrators.

The program does not have the capability to inform users of any changes made in this window. So you will want to inform them directly about such changes, such as adding them or changing their Access Level.

Any users that you add in this window will still have to download and install the OnDemand Client program from our web page <https://software4nonprofits.com/pricing/donation-cloud/#step-2>, if they do not yet have it installed. They will also need to be given a login with the same User Name in the OnDemand User Management program, before they can log in.

Users who have been set up with a login in the OnDemand User Management program, but have **not** had the same User Name set up in this window, will automatically get Full access in the database when they first start DONATION.

Users of instances of DONATION and/or ACCOUNTS that have multiple databases can have different Access Levels in each one. Such users can be limited to only accessing specific databases, by giving them the No Access access level in the databases to which they should not have access.

You can delete a user by clicking on the **Delete** button on their row. You then have to click **Save** to complete that deletion, or you can click **Cancel** to cancel it.

**WARNING:** Deleting a user in this window will **not** prevent them from running DONATION, until you also delete them in the OnDemand User Management application. If you are not an OnDemand Site Administrator, you will have to have your organization's Site Administrator do that. Until that is done, if the user you only deleted in the window above tries to run DONATION, they will be added back to this list with the Full access level!

### Managing your own Login

If you are not a Site Administrator, you cannot change your own login in any way, except when the OnDemand client prompts you to change your password.

Site Administrators can use the User Management program to change existing user's recorded first and last names and email addresses, and do password resets. Login User Names, however, cannot be changed. If you want a different User Name, the Site Administrator can just create an additional login for you with the User Management program with the desired name and you can switch to using that. (They may want to then delete your previous User Name.)

**See Also:** [OnDemand Version Overview](#)

## 25.5 Security

Please read the OnDemand [Overview](#) section first, if you have not already done so, before reading this section.

If you use the [OnDemand Version](#) of the program, both the DONATION program and your database are stored on secure ACS Technologies servers. All communication between the OnDemand Client application on your computer and the server is encrypted, using secure protocols. General ACS Technologies security information (some of which applies to other programs that they sell, but some of which also applies to DONATION OnDemand) can be found at <https://legal.acst.com/data-security-measures>.

Although your communication with the server is protected by strong encryption, ultimately the final level of security will always depend on securing the login user name and password you use to access the database through the program. (Anyone with that information could install the OnDemand Client program and access your database. Virtually any cloud-based or web-based software has exactly this same problem!) That is why strong passwords are required for your login.

Because no extremely valuable information like credit card numbers is stored in the DONATION database (or at least, you should not be doing so!) there is also probably very little incentive for hackers to try to get at your data.

Also as with virtually any software service where your data lives on a server, we can have access to your data. However, other than to help you resolve difficult or unusual problems, we can assure you that we have no interest in looking at your data!

**See Also:** [OnDemand Version Overview](#)

## 25.6 Date Formats

Because the OnDemand version runs the actual program on a server, rather than your computer, any date formats you set in Control Panel on your computer will not apply to it. And for security reasons, you cannot run Control Panel on the OnDemand server.

To work around that, the OnDemand version has a new menu option **Maintenance** ⇒ **Date Formats**. Selecting that brings up a window such as the following:

Select Date Formats

Example:

Short Format:

Long Format:

Whatever you select there will be saved for use whenever you run DONATION. Although there are drop-down lists of common options for the date formats, you can also type them in yourself if you want something that is not on the list. When you click **OK**, the program will tell you whether what you have entered is valid and thus can be saved.

Here are the meanings of the various parts of the date formats that you can use:

- d: 1 or 2 digit day number in the month, as required
- dd: 2 digit day number in the month, like 01 for the 1st or 31 for the 31st
- ddd: not allowed (short name of the day of the week)
- dddd: not allowed (long name of the day of the week)
- M: 1 or 2 digit month number in the year, as required
- MM: 2 digit month number in the year, like 01 for January or 12 for December
- MMM: short name of the month
- MMMM: long name of the month
- yy: 2-digit year, like 21 for 2021
- yyy or yyyy: 4-digit year

Please note that the settings are case-sensitive. Codes for days and years must be lower case d's and y's, and codes for months must be upper case M's.

The settings you set in this window are just for your user login to the OnDemand version of DONATION. Other users from your organization can have different settings.

## 25.7 Troubleshooting

This page explains various problems that can come up when starting to use or continuing to use the OnDemand version, and solutions to those problems.

### **I am Prompted for a Host Address when I Start the OnDemand Client Program**

This is actually explained in the [Download Links](#) area of the OnDemand web page, when you click on the link for your operating system (e.g. Windows or Mac). Usually it only comes up when you use the Mac version for the first time.

Just enter the following if you are prompted for the Host Address:  
**s4np.ondemand.acstechnologies.com**

**"Failed to connect to 's4np.ondemand.acstechnologies.com' on port 491"**

If this message comes up when you start the OnDemand client program, it will usually be an issue with Firewall software on your computer or network not allowing you to access external resources on TCP port 491.

For some instructions on making changes to your Firewall, see the [Firewalls](#) section of the Local Network Versions help page. Where that section refers to port 3050, you will need to substitute 491.

Further resources about this error from ACS Technologies, who run the OnDemand servers, are at: <https://wiki.acstechnologies.com/display/OnDemand/Failed+to+connect+to+server>

One other possibility with this error (or similar ones) is that you are trying to connect from outside of the U.S.A. or Canada, which is normally not allowed, for security reasons. (That is imposed by ACS Technologies, who run the OnDemand servers.) If this is the case, please [contact us](#) to discuss your options.

And a final possibility is that the OnDemand servers are down or for some other reason cannot be accessed, such as a major Internet failure. Normally the servers are all rebooted in the early morning (between 2:50-3am Eastern time), but very infrequently a fairly quick reboot will also be needed during normal working ours.

**Nothing Happens when I Click on DONATION or other Programs on the OnDemand Menu**

You have to double-click, just like on the Windows Desktop!

**I Can't Access my Computers's Hard Drive for Backups, Importing, or Exporting**

Your computer's hard drive when you are running the OnDemand programs shows up as drive J:, not C:. and successive drives (such as USB memory keys) show up as successive letters, like K: or L:. See [here](#) for more details.

**Reports and/or Receipts Appear Blank on Screen**

This is a problem that a small number of our OnDemand users have with their printer driver.

To start working on resolving this, you first need to run the OnDemand Printing application from the main OnDemand menu window that you start DONATION from.

Click on your printer in the window that comes up, then click "Driver ...". Drop down the list of drivers, and look for one for your exact printer model, or one from your printer manufacturer with a similar model number. If you find it, save it with OK, then go back and see whether reports are displaying properly in DONATION.

If it isn't, first of all, please tell us exactly which make and model of printer you have, and which driver you tried. That will allow us to investigate whether a better driver can be found.

Then, since it isn't working, just delete that printer from OnDemand Printing by clicking on it and clicking the "Remove" button. That will leave in a printer called "Preview PDF".

Click on "Preview PDF" then click the "Set Default" button.

Then try running DONATION again, and generate your report, which should look OK now. Assuming it does, click Print, and print to that "Preview PDF" printer - which will be the only available choice. That will bring it up in your own computer's PDF viewer application (usually Adobe Reader) and you should be able to print fine from there.

### **"IDS Server ... Failed to authenticate user"**

This occurs if your username and/or your password are incorrect when you try to log in. Please see the following section for solutions.

### **I am Locked Out after Failing to Enter my Password Successfully**

There are actually no lockouts in OnDemand. If you get kicked out of the login window after a few unsuccessful login attempts, you can immediately open it again and try again.

If you have another OnDemand user in your organization who has been set up as a Site Administrator, they can use the User Management application on the OnDemand menu to reset your password for you, if necessary.

If you still can't log in for yourself, and don't have someone else in your organization who can reset it for you, as explained in the previous paragraph, please get [contact us](#) and we can reset it for you.

### **"Windows is searching for ids.exe"**

This happened to some users when they tried to run the OnDemand Client program after it had prompted them to upgrade it.

The solution if this occurs is to just re-install from the [Download Links](#) area of the OnDemand web page.

### **I Can't Paste my Username and Password into the Login Window**

Unfortunately this is a limitation imposed by Graphon, the underlying originators of the OnDemand software.

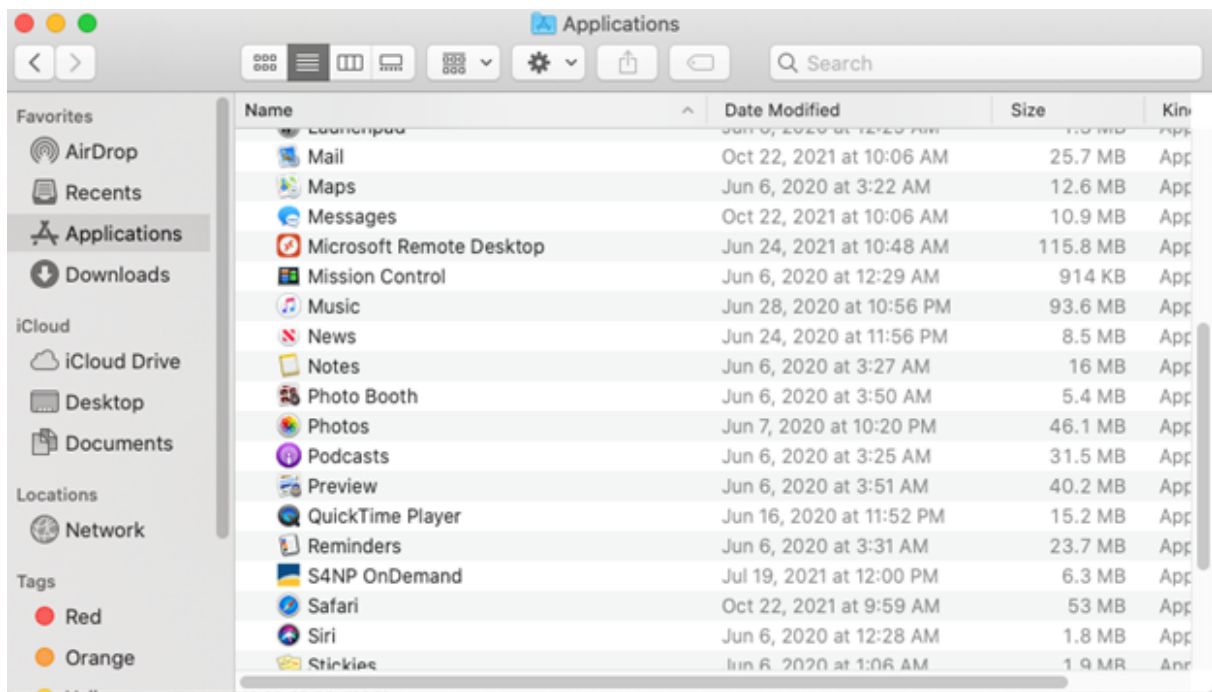
If you feel that your computer is private and secure, and you want to avoid having to log in every time you start the OnDemand client, there are instructions on the [Command Line Arguments](#) page for adding your user name and password to the command line used for starting it. If you do that, you will have to change the command line arguments every 180 days, when the OnDemand system requires you to change your password.

Another option is if you use a password manager that can type in your login and password for you. We found with the open source password manager [KeePass](#) that this would work, but what it typed to enter the username and the password had to be changed to each be preceded by two arbitrary characters and then two backspaces to make it work reliably. So what it calls the "Autotype Sequence" was "!!{BACKSPACE}{BACKSPACE}{UserName}{TAB}!!{BACKSPACE}{BACKSPACE}{Password}{ENTER}". However, even this trick may not work if you have special characters (other than letters and numbers) in your password.

### **I'm on a Mac and Nothing Happens when I click GO after starting the OnDemand Client Program**

This problem is about when the window with the title bar “S4NP OnDemand” and text “Welcome to S4NP OnDemand” comes up, and you click the **GO** button on it, and nothing happens.

This is usually if you haven't fully followed the Mac instructions in the [Download Links](#) area of the OnDemand web page to drag the installed S4NP OnDemand icon into the Applications folder, and run it from there. This will be the case if you are running from a folder labelled S4NP OnDemand with two icons in it, S4NP OnDemand.app and Applications. You need to drag the S4NP one into Applications, open Applications, and run it from there. It should then work. Your Applications folder should look like this (if set to show details rather than icons). Of course the apps in it will vary depending on what they have installed, but what's important is that they have one named exactly “S4NP OnDemand”.





## 26 REVISION HISTORY AND BUGS / FEATURES

### 26.1 Revision History - Latest Version

This page and the subsequent ones linked at the bottom of the page list all of the significant improvements and bug fixes in each release of the program.

For anyone that is interested, we can send you a list of **future** work that we are considering doing. Please [contact us](#) by email if you want that.

#### **Release 6.06d (December 27, 2023):**

- In several variations of **Reports** ⇒ **Receipt** ⇒ **All Receipts** (which depend on whether you have chosen to have separate receipts for Gifts in Kind, and whether you are displaying the Eligible Amount field for donations), fixed the summary total amount fields to be lined up properly under the individual amounts in the report.
- For OnDemand and Local Network versions, display a banner saying "Connecting to SQL Sever" when it is attempting to do that as the program starts, or after certain other activities. Usually it will only be displayed for a fraction of a second, but if there is ever a problem with the SQL Server, the appearance of this banner will help you and our support team understand what is blocking the program from starting.

#### **Release 6.06c (September 8, 2023):**

- Fixed a bug in the **Database** ⇒ **Reassign Envelope Numbers** [menu option](#), where selecting the option "All donors who already have an envelope #" causes a technical error message about invalid SQL, after which the reassign does not happen.

#### **Release 6.06b (July 27, 2023):**

- *This change is only relevant for Software4Nonprofits staff:* For OnDemand users, log many actions in the program that any user uses. This will enable us to determine which actions are most commonly used, by summarizing the results across all OnDemand users.

#### **Release 6.06 (June 26, 2023):**

- Removed an unnecessary restriction, that you couldn't use the **Receipt** ⇒ **Duplicate/Corrected by Number** [menu option](#) if the currently selected donor was [non-receiptable](#). Since that option prompts for the receipt number to correct, it was not necessarily going to be used for the current donor! For Canadian users, this also applies to the **Receipt** ⇒ **Gift in Kind Receipts** ⇒ **Duplicate/Corrected by Number** menu option.
- When clicking **Memorize** from the [SQL Select](#) window, if your SQL is valid but doesn't return any rows of data, you are now given a choice of whether to still memorize it for later re-use. Previously you would get a message that it didn't return any data and you were not able to complete memorizing it.
- When using the **Memorize** button to re-save a previously-memorized report from either the [SQL Select](#) or [Reports-viewing](#) window, if you change the Name, you are now given an option of saving an additional memorized report with the new name, or renaming the previous-saved memorized report to the new name. Previously it always saved an additional

memorized report with the new name (unless it was just a change in capitalization, which still doesn't cause you to be asked about this).

In addition, if you got to those windows from the [Memorized Reports](#) window, any changes made to the name of the memorized report you are working on are now reflected properly in the drop-down list of names on that window, which was not always the case before.

- Fixed an omission: the Help button in the **Maintenance** ⇒ **Setup Abundant Online Donations** [window](#) did nothing. Now it goes to the correct Help page.
- *This change is only relevant for Software4Nonprofits staff:* For OnDemand users, log each report that any user runs. This will enable us to determine which reports are most commonly used, across all OnDemand users.

#### **Release 6.05b (May 16, 2023):**

- Some internal code changes that do not affect the program's behaviour, related to our use of a new server URL for some of the services such as Internet Backups and license key requests.

#### **Release 6.05 (April 23, 2023):**

- Changed the Donor Category 1 and 2 fields, and the Donation Category field, to allow up to 40 characters. Previously they only allowed 20. To allow for this, various types of changes were made:
  - Where there was room, data entry and report fields were extended to hold the longer values.
  - Where there was not room in data entry windows, pop-up tooltips were added showing the entire value when your mouse moves over the field, and the drop-down lists of options were expanded to show the entire value.
  - When there was not room in reports, the field was changed to wrap onto a 2nd line of the report, in order to show the entire value.
- When you are [Configuring Bank Deposits](#), if you choose that it's for exporting to Software4Nonprofits ACCOUNTS, and you have ACCOUNTS on the same computer, then in the [Edit Accounts for Categories](#) window, the Account field drop-down now does not allow editing - you must select one of the Income accounts that was retrieved from your ACCOUNTS database. (If you need a new account in ACCOUNTS, you will need to create it there first, then you may need to restart DONATION to pick it up.)
- When you are [importing donors](#) or [importing donors or donations](#) from files, if you were importing the Member/Envelope # field and your input file had commas in those values (like 1,234) that would cause an error message. Now it's allowed - the commas are just removed.
- In the [Find Donor](#) window, if you enter a number that includes a comma in the Number field, you now get a clear error message instead of a techie one that just says "Expression is not valid". (Member/Envelope Numbers can only include digits, no commas.)
- Fixed a small bug in the [autocomplete](#) for fields like donor or donation Categories, and Cheque # / Paid By: sometimes if you had entered something, then entirely backspaced it to try entering something else, the autocomplete wouldn't start until you had typed 2 characters, when it should have started on your first character.
- Fixed a limitation of the [Simple Filter](#) window: you could not type (or paste) text into the Value field that was longer than would fit in the display area, because it would not scroll to the right as you typed.

#### **Release 6.04c (March 23, 2023):**

- Software4Nonprofits has a new website. Where possible, references in the program and this Help file to pages on the old website have been converted to the most closely corresponding pages on the new website. (Some less-used pages on the old website do not yet have equivalents on the new website, so links to them will be unchanged, and will still work.)
- Removed the little-used menu option **Help** ⇒ **Read Manual**. The main purpose of that was to take you to a web page from which you could download a PDF version of the entire help file. That really wasn't useful because it wasn't as searchable as the Help file, was way too long to print, and would go out of date as soon as there was a new release of the program.

#### **Release 6.04b (March 18, 2023):**

- Fixed a serious receipting bug introduced in Release 6.02, which could only occur for donors that had a value in the Donor Category 2 field, when at least one value available for the Donor Category 1 field was non-receiptable. It could cause two problems:
  - It could fail to create receipts for all of the donors it should have created them for, when using **Receipt** ⇒ **All Donors** or **Receipt** ⇒ **Filtered Donors**, and could give messages like "There are no receiptable regular donations" when trying to create a receipt for one donor that had receiptable donations, with **Receipt** ⇒ **Current Donor Original** or **Receipt** ⇒ **Current Donor Sample**.
  - It could give receipts to donors with a non-receiptable value in the Donor Category 2 field, with any of those same menu options.
  - For Canadian users, the same problems could apply to the special [Gift in Kind](#) receipts.
- There is a new option for [Phone # Format](#) on the Donor Details tab of **Maintenance** ⇒ **Main Window Options**. It allows you to switch between 10-digit phone numbers being automatically formatted like "(123) 456-7890", the default, to being automatically formatted like "123-456-7890", or to not be reformatted at all.
- The program already reminds you monthly to check for updates, if you haven't done so for at least a month. Now, if other users of the same database already have a newer release of the program than you do, it also informs you of that fact as part of the message encouraging you to upgrade. (However, that will only happen once all users have at least this release.) It can be important to have all users on the same release of the program!
- Fixed a bug: If you use **Maintenance** ⇒ **Main Window Options**, and on the [Pledges](#) tab, you are using an option that allows for a default pledge category, and you change that category, and there were existing pledges with the old category, you are asked whether to update them when you click **OK**. If you answer Yes, then you got an error "Data Entry Error, Expecting 2 retrieval arguments but got 1". This was quite harmless except that if the current donor had a pledge with the old category, it would not be updated if you immediately clicked into.
- Fixed an obscure problem: If we ever gave you a SQL Updating password along with some SQL to fix or change some data in your database, and it was based on a version of your organization name but with the wrong capitalization, it wouldn't be accepted. You couldn't fix that by just changing the capitalization to match what we gave you, via **Maintenance** ⇒ **Organization Info**, unless you exited and restarted the program afterwards. Now in such cases that will immediately fix it.

#### **Release 6.04 (March 1, 2023):**

- Evaluation versions (with no payment) now allow you to create real charitable tax [receipts](#), not just sample ones.
- The Standard version is now free for users with no more than 50 donors with donations in the current year, and thus does not require a payment or license key until you exceed that

number. The only other limitation in that case is that you can only have one database for one organization.

- For the OnDemand or Local Network versions, or the Standard version if you have over 50 donors with donations, the program now starts with a 30-day evaluation period. If that expires before you pay and get the required license key, you get a 30-day grace period in which you can pay, before the program will stop working until you do pay. This replaces the prior wording of it being a 60-day evaluation period, though it gives you the same number of days.

#### **Release 6.03c (February 22, 2023):**

- Corrected the [Lite Version Limitations](#) help page, which incorrectly still stated that the Lite version had a large number of limitations. Most of those previous limitations were put back into the Lite version in Release 6.03, so it had almost all of the same features as the paid versions, but that page was not updated appropriately.
- Fixed a bug in [Custom Reports](#), where if you selected any of the fields Month Received, Quarter Received, or Year Received from the Donation column, and also anything from the Receipt column, you would get a technical error including "Ambiguous field name between table DONATION and table RECEIPT DATE\_RECEIVED".

#### **Release 6.03b (February 18, 2023):**

- Some files required by the features added back into the [Lite version](#) were omitted from the installer for Release 6.03. They have now been added back in.

#### **Release 6.03 (February 17, 2023):**

- The free [Lite version](#), which used to have many feature limitations when compared to all other versions, has now had almost all of those features put back in. The only remaining limitations are that it doesn't allow for [Switching Databases](#), and only allows a maximum of 100 donors with donations. It is also in the process of becoming a "legacy" version, meaning that existing users may keep it, but it will soon not be available to new users.
- Fixed a bug in the **Maintenance** ⇒ **Recurring Donations** [window](#), where it would prompt with a technical-looking window for a YEAR\_NUMBER.
- Fixed an oversight in the new menu option **Tools** ⇒ **Pay your Annual Fee**: it should not have attempted to do anything for the free Lite version, because that version is free! Now, using that menu option for the Lite version will give you an option to upgrade to the full Standard version, after which you could pay.
- When you request or automatically retrieve license keys, or request evaluation extensions, the program now sends us your Windows version number. That will help us to understand which older versions of Windows are still in use by our customers.
- A couple of users have had strange technical error messages when creating receipts for one donor, that include "validation error for column RECEIPT.TOTAL\_AMOUNT, value null". While we do not yet know the reason for this, if it happens the program will now display a log of detailed information to be emailed to us, to help us resolve it.

#### **Release 6.02 (February 10, 2023):**

- Added a new menu option **Tools** ⇒ **Pay your Annual Fee** which takes you to our payment processor Stripe to pay for the program and set up an annual subscription.

- Fixed a bug saving built-in (not mail-merge) Gift in Kind receipts for Quebec to PDF, with an error like "Error at line ... in wf\_save\_pdf event of w\_report: Name not found accessing external property year\_number ...".
- Made some changes to prevent an occasional problem, particularly for OnDemand users, when doing [Gmail-Specific Authorization](#). The fixed problem was one that would show you a technical log including a line saying "SocketError: WSAEADDRINUSE: Only one usage of each socket address (protocol/network address/port) is normally permitted."
- Two reports under **Reports** ⇒ **Donation** ⇒ **All Donations - Sort by Date, with Description** and **Sort by Date, All Fields** - did not have the total Amount at the bottom of the report lined up properly under the Amount column. That is now fixed.
- Greatly sped up the loading of very large import files, for instance for use with the **Database** ⇒ **Import** sub-menu options **Donors**, **Donations**, or **Donors and Donations**. This will probably not be noticed unless you have thousands of lines in your import file.
- *Technical note, primarily for Software4Nonprofits staff:* Major internal re-write of how the program ensures that everything is done for the current working year, as determined by the **Maintenance** ⇒ **Change Year** [menu option](#). The previous method could sometimes cause random crashes when changing years, or doing related activities that *might* change the year, such as restoring a database backup.
- In the SQL that can be executed in the **Database** ⇒ **SQL Select** [window](#), added a new value "YEAR" that can be included, and will be automatically replaced by the current working year in the program, as set by the **Maintenance** ⇒ **Change Year** [menu option](#). That helps to allow Custom Reports and custom SQL to be built that always refer to the current working year, or ones a specific number of years away from the current working year.
- Also in the **Database** ⇒ **SQL Select** [window](#), if SQL is displayed from memorized reports that were memorized prior to this release, it is possible that some aspects of that SQL would no longer work properly. The program will inform you of that, and attempt to fix the SQL so that it will work.
- As well as silently sending us your Release Number after installing any update, the program also now sends us your Windows version number. That will help us to understand which older versions of Windows are still in use by our customers.

#### **Release 6.01b (January 20, 2023):**

- Fixed a problem introduced by Release 6.01, where when you [changed years](#), a window would pop up with the heading "Specify Retrieval Arguments" and prompting for you to enter a YEAR\_NUMBER.

#### **Release 6.01 (January 19, 2023):**

- Some users were having problems where the program would exit, with no error message, after returning from printing or emailing individual receipts, sometimes only after they did two receipts in a row. This release seems to largely prevent that.
- Fixed a bug for Canadian users of mail-merge receipts, when creating [Duplicate or Corrected receipts](#). Any replaced or corrected receipt, which was for \$0 and had no donations in it (because they were moved to be part of the replacement or correction receipt) would not display on the screen, or print. Only the replacement or correction receipts appeared and printed. Now the replaced or corrected ones do appear again, as they do for built-in receipts.
- Made two changes to the insertion of the [DetailsTable](#) field in mail-merge letters and receipts: you can now remove the Category field from the fields to display, and you can



double-click on entries in the two lists (Available Fields, and Fields to Display) to move them from one list to another (the same actions as the **Add** or **Delete** buttons do).

- When you are setting up [Gmail-Specific Authorization](#) in the **Maintenance** ⇒ **Email Sending Configuration** [window](#), when it takes you to a browser window to log in (if necessary) to your Google account and authorize emailing from DONATION, you now have 90 seconds to do so. It used to be 60 seconds, but that could be too short if you had any trouble logging in, or had 2-step verification required on your account.
- Prevented technical errors, which caused a crash in the program after allowing you to email us a screenshot, if you were editing the template for a mail-merge letter or receipt and you tried to Print it or Save PDF. The errors were "Error at line 44 in of\_print event of u\_web\_browser" for Print, "Error at line 58 in of\_pdf event of u\_web\_browser" for Save PDF.

#### **Release 6.00d (January 9, 2023):**

- Fixed a problem when Installing a license key with **Tools** ⇒ **Request or Install License Key**, where you would get a message saying "The second line of this License Key should be 34 characters long, but is actually 33 characters long" for a perfectly good license key. It happened for users who had paid by Stripe, had the Standard version, and had already upgraded to release 6.00 or later before they requested the license key.
- When using [HTML in the body of emails to donors](#), one user was finding that the program crashed with specific HTML in the body. That is now fixed.
- One user was having problem with the initial creation of the [Abundant](#) online donations account. The technical transaction that was failing is now recorded in the program's log file in case it is needed.
- *Technical note, primarily for Software4Nonprofits staff:* Much of the code for regular expression handling in the program (which is used for purposes like validating that email addresses are correct) has been replaced by the use of a new library.

#### **Release 6.00c (December 3, 2022):**

- Prior to automatically transmitting a notice to us when you update your program, if your database doesn't yet have a Unique ID for Internet Backups, one will be assigned to it and transmitted to us. That does not mean that you have configured Internet Backups, or that you have to use them! Rather, that is a unique identifier for your database / account that will help with other automated processes, like future automatic license key retrievals (for versions other than Lite, which doesn't need license keys).
- A few users, when they updated to Release 6.00b, were getting a message about "Error in unlock key for Chilkat ..." when the program started after the install. While that could always be fixed with either a reboot or a 2nd install of that Release, we are not sure why it happened. This Release gives a more detailed error message if that problem occurs, which could be sent to us as a screenshot, to help us understand it and hopefully prevent it in the future.

#### **Release 6.00b (November 25, 2022):**

- Fixed a problem where email sending using the Microsoft SMTP server smtp.office365.com, configured with the **Maintenance** ⇒ **Email Sending Configuration** [window](#), had stopped working recently.
- Fixed a problem: [Importing PAR](#) donation files had stopped working for at least one user, because the import file they were trying to import, that they had received from the PAR service, had incorrect line endings - two carriage returns and a line feed, which should have

been just one of each. (We are not clear whether the file was sent out with this problem by the PAR service, or whether the file was somehow damaged when it was saved to the user's computer.)

#### **Release 6.00 (November 23, 2022):**

- The program now checks for whether there's a newer license key available for you to retrieve, every time you start it, even if your current license key isn't expiring yet - as long as your computer has Internet access.
- Made various changes to make the program work with our upcoming change of payment processors from PayPal to Stripe.
- Fixed a bug that allowed an automatic retrieval of an expired license key that expired before your program's release date. That didn't make sense, since the newer program is an upgrade, and an expired license key doesn't entitle you to an upgraded version.

#### **Release 5.06e (October 31, 2022):**

- Improved the change that was the last point in the notes for Release 5.06d, about silently informing us when you install a new release of the program. In most cases, that will now update our records automatically, rather than sending us an email.

#### **Release 5.06d (October 17, 2022):**

- Fixed some odd problems with [Recurring Donations](#) that can occur if there is a memorized recurring donation for a donor that has been deleted, or has not been copied from a previous year. The fixes include:
  - Asking about deleting a donor's recurring donations if you ask to delete the donor,
  - Preventing attempts to insert recurring donations in a new year that has not yet been switched to for the first time, and
  - Asking what to do if there is a recurring donation that should be inserted for a donor that is not present in the data for the year of the recurrence date.
- Two further fixes related to [Recurring Donations](#):
  - When inserting recurrences with an End Date, after which there could be further recurrences before today's date if it was ignored, it was in fact ignored, and so extra recurrences were inserted.
  - Recurring donations displayed on the **Maintenance** ⇒ **Recurring Donations** [window](#) now show up in all red font if they have an End Date prior to today's date.
- When you first install this release, or any new release after this, as long as you have Internet access working on your computer, the program will silently send us an email to inform us of your new release number. That will allow us to better support you if you have any problems with the program, since we will know what features and bug fixes you have in your release of the program.

#### **Release 5.06c (September 28, 2022):**

- When adding subtotals to a [SQL Select](#) or [Custom Report](#), there is a new checkbox, after selecting the column that determines the subtotal breaks, for "Add page break for each new Subtotal value". If you check that, a page break is added between the rows for each value of that column (after showing the subtotal).



- Fixed an error when running the new **Reports ⇒ Donor ⇒ Recorded Communications** that gave a message including "[ODBC Firebird Driver] Sqlda variable has zero length", causing the report to not be displayed.

#### **Release 5.06b (September 5, 2022):**

- Fixed a bug introduced by Release 5.06 ("Error at line 51 in of\_print event of u\_web\_browser") that occurred if you chose to Print a mail-merge letter (but not a receipt).

#### **Release 5.06 (August 30, 2022):**

- Added a significant new feature: [Recorded Communications](#), that automatically records communications with your donors such as emailing, printing, or saving receipts or letters to PDF, allows you to manually record phone calls or visits to them, and allows you to view, edit and print reports on those communications.

#### **Release 5.05d (August 18, 2022):**

- Fixed a bug that could cause imports of donors and/or donations (with any of the first three options on the **Database ⇒ Import** [sub-menu](#)) to crash, after they finished successfully, with a message that started "Error at line 5 in f\_record\_sqlpreview event of nvo\_import\_donors\_donations: Divide by 0 ...".
- Fixed a small problem in some of the One Date Donation [reports](#) options. If you used the Save PDF button, the resulting PDF version of the report would have blank pages (or ones with just little bits of lines at the far left) after each normal page of the report. That problem did not occur if you just printed to your printer, or used the Microsoft Print to PDF printer.
- Fixed the same problem with Save PDF having extra blank pages after each page in [Custom Reports](#) printed in Portrait mode.
- Fixed a few problems for [Donor Only](#) users, including not having access to the [Report Browser](#) or the **Maintenance ⇒ Groups / Committees** [menu option](#). Also redesigned the programming that determined which menu options, and which reports, could be seen by Donor Only users.
- Made some small fixes to the [Report Browser](#) for all users, including that it did not show exactly the right report if Canadian users ran the All Receipts report under the RECEIPT REPORTS heading.

#### **Release 5.05c (August 4, 2022):**

- Fixed a bug introduced by Release 5.05: various actions, including trying to request or retrieve a license key, could give "Error at line 16 in gf\_email\_valid". Editing a donor's Email address value then tabbing or clicking out of that field could also give that error. Either error would crash the program.

#### **Release 5.05b (August 2, 2022):**

- Fixed bugs introduced by Release 5.05: emailing built-in (not mail-merge) receipts or [statement](#) reports would crash the program with an error such as "Error at line 517 in wf\_email event of w\_report". Printing built-in receipts could give a similar error.

#### **Release 5.05 (August 1, 2022):**

- The **Database** ⇒ **Reassign Envelope Numbers** [window](#) has a new radio button option in the "Give new numbers to" group: "All donors". That gives new numbers to every single donor, whether or not they are a business, and whether or not they already have an envelope number.
- Fixed a bug: in fields with the [autocomplete](#) feature, like the donation category, typed digits that were part of an entry on the list of values for that field would be ignored if they were typed using the numeric keypad. Digits typed using the top row of your keyboard were already working correctly.
- For users of the [Abundant](#) online donations system, added a new Help sub-section on [Support](#), which gives information on how to contact ACS Technologies directly for problems that don't involved the DONATION program itself, but only the Abundant website.
- When the program creates receipts, which have security added so that they cannot be modified etc., changed it so that the Security property "Content Copying for Accessibility" was still enabled. That allows screen readers to read the text. (This needed to be fixed for built-in receipts, and for [mail-merge receipts](#) when you had not selected Chrome for saving PDF, in the [Receipt Options](#) window. If you used mail-merge receipts and used Chrome, it was already OK.)
- Fixed a bug that could occur when creating a new year's data with the **Maintenance** ⇒ **Change Year** [menu option](#). If you were asked whether to skip copying donors with no donations in the previous year or previous 2 years, and you chose that option, and there were donors with [Customer IDs](#) but no donations in those years, it would throw an error and not copy **any** donors' Customer IDs forward to the new year.
- Corrected an oversight: users entering the program with the read-only password were allowed to edit [Memorized Report](#) names and descriptions on that window.
- This release was created with a new version of the programming environment we use - PowerBuilder 2021. Because of that, it can no longer be installed on Windows 7, Vista, or 8.0. It can be installed in Windows 8.1, 10, 11, or Windows Server 2008 SP2 or later.
- Made a change to the sequence of events when exiting the program that may prevent some error messages about not being connected to the database.
- Added a **Help** button to the **Tools** ⇒ **View Saved Settings** [window](#).

#### **Release 5.04c (June 22, 2022):**

- When exporting [Bank Deposits](#) or [Abundant Bank Deposits](#) for importing into ACCOUNTS, export them in a way that is more guaranteed to work if they contain accented characters.
- (This point is primarily for our own staff.) Change some code used for reading text files that can fail to read the entire file if the file has an ANSI rather than Unicode encoding, but has accented characters in it.

#### **Release 5.04b (June 21, 2022):**

- For users using [Gmail-Specific Authorization](#) for their [Email Sending Configuration](#), fixed problems that could occur in some situations:
  - You could get a message saying "There was an errors in the Specific Authorization for Google: Error: response information is not complete." After that you would have to redo the setup.
  - You could be required to redo the Authorization every time you used email sending with Gmail, if it was more than an hour after the last time you had used that.
- When you are setting up [Recurring Donations](#), if you got a message about there being existing matching donations for dates prior to your entered start date, and you answered

"Use these Settings" to accept your settings as entered anyways, the program would crash. That is now fixed.

#### **Release 5.04 (May 31, 2022):**

- Changed how the donation Category and the two donor Category fields work with the [keyboard](#), in order to make it easier to select them when you have a lot of categories:
  - Previously you could not type in those fields, but pressing the first letter of a category would bring up the first category starting with that letter, and pressing it repeatedly would bring up successive categories starting with that letter.
  - Now it has "autocomplete", where you can type in the field and it shows you matches to what you have typed so far, with the part you haven't typed highlighted so it will be replaced if you keep typing. So for instance if you had donation categories Garden and General, typing "G" would bring up Garden, and adding "e" would change it to General.
  - You can still use the drop-down list, or use the arrow keys to move through the categories (perhaps after typing the first part of a category name) even without dropping down the list.
- Fixed a problem when doing [Gmail-Specific Authorization](#) for your [Email Sending Configuration](#). When it took you to the browser window to do the authorization on Google, if you didn't succeed in doing that, or closed that window etc., the program was supposed to stop waiting for you to do that after 60 seconds. It would actually never stop waiting, and you might have to force the program to exit, to get out of that wait.
- Fixed a problem for importing files downloaded from [CanadaHelps](#): their CSV Data Download file would give errors and not import, unless you loaded it into Excel and re-saved it, either still as CSV or as a tab-separated text file.
  - Technical information about this fix, for Software4Nonprofits staff to understand it: The downloaded file was using the UTF16-LE Unicode file encoding with no Byte Order Mark (BOM), which really should not be done. (We have written to CanadaHelps to suggest they change this.) To adjust for this, we added some detection using a function supplied by Windows for detecting such files, which however can still give incorrect results for some files, and thus could possibly lead to other text files with unexpected encodings that were being read by DONATION being misinterpreted.
- Two fixes for the importing of [Vanco](#) donations:
  - When displaying the donations to be imported, changed the display of the Amount to be in your normal currency format, rather than as a number with 4 decimal places.
  - Don't allow donations that are not in your current working year to be imported into the current year. Instead, give a message saying what year they are in, with instructions to switch to that year in order to do the import.
- Fixed a subtle and somewhat unlikely to occur bug in the [Simple Filter](#) window. It occurs if you have two or more filter conditions using the Operators IN or NOT IN, and the comma-separated list of Values for one of the earlier conditions has more items in it than the comma-separated list of Values for one of the later conditions. In that case, one or more of the Values for the earlier conditions will actually be incorrectly added to the list for the later conditions, in the calculated technical filter string. (Note: no users have reported encountering this bug - we just happened to notice it ourselves!)

#### **Release 5.03b (May 7, 2022):**

- Since all @telus.net and @telusplanet.net email addresses are now served by Gmail servers, the verification etc. in the [Email Sending Configuration](#) windows has been changed to use Gmail settings for them. This also means that you can use the [Gmail-Specific](#)

[Authorization](#) option for them. (This was supposedly fixed in release 5.01d, but actually wasn't.)

- For OnDemand users only, [saving of PDFs](#) from mail-merge letters or the mail-merge version of receipts had been having problems, for the last few weeks at least. Often it would work for one document, but hang indefinitely (showing the "Printing to PDF file ..." window) on a 2nd or subsequent one, particular when you were emailing with **Letters** ⇒ **Mass Mailing** or emailing a group of mail-merge receipts done together. This problem was caused by a change to the underlying remote control software, and fixed overnight on May 5th by our partners who run the OnDemand service at ACS Technologies. (The fix did not require this release of DONATION.)
- Changed the [saving of PDFs](#) with Chrome, for mail-merge letters and receipts, to have a reasonable timeout, so that if anything is going wrong with that process. it can't hang the program indefinitely, looking at the "Printing to PDF file ..." window.
- Two changes for users of the [Cloud Storage Service](#):
  - For the cases when you do not have an Internet connection when you **start** the program, it gives better messages and options about reconnecting before you continue, to avoid having only read-only access to your data.
  - For the cases when you lose your Internet connection before you **exit** the program, it gives clear options to reconnect. If you cannot reconnect to the Internet, the messagebox about that now gives better instructions as to what to do to ensure that your last changes (if any) are uploaded to the Cloud Storage and your control of it is released.
- For users of the [Cloud Storage Service](#) or [OnDemand](#) version, the prompt that comes up if you have left the program running for two hours without doing anything in it, saying it will exit, is now forced to be "attached" to the program's main window, so the main window is always visible then it comes up. That should be clearer.
- Made some changes for automatic license key retrievals, so that if you have only paid for the Standard version, but have installed the more expensive Local Network or OnDemand version, you will get an appropriate message, explaining that an upgrade payment is required if you want to switch to that.

### **Release 5.03 (April 8, 2022):**

- When you are [entering](#) new Donor Details or editing existing ones, made the following changes:
  - As you tab or click out of the Phone field, it will be reformatted into the format (123) 456-7890 if it was in various other formats, including if it is just digits, or with spaces, periods or dashes between the sections. Issues with 7-digit phone numbers are also fixed. (Previously this was only done, to a more limited extent, when you Saved the changes.)
  - As you tab or click out of the Postal Code field, both Canadian postal codes and US zip codes will be reformatted if necessary, for instance if there are no separators between the sections, dashes (which should be spaces) between the sections of Canadian ones, or spaces (which should be dashes) between sections of 9-digit US ones. Lower case letters in Canadian ones will also be upper-cased.
- Changed the help for [Gmail Configuration](#) to point out that after May 30, 2022, only the Gmail-Specific Authorization option, or using 2-step verification and an application password, will work. The option of allowing "Less Secure Apps" is being removed.
- Fixed a bug when setting up or editing [Recurring Donations](#): If you set it up with a Start Date before today's date, the program checks whether there are already prior occurrences of this donation. If so, it proposes another starting date, after the latest date of those existing donations. If you accept the proposed date as the new starting date, that new date is now properly updated on the recurring donations detail window, which was not happening before.

- Added a Help page on [OnDemand Troubleshooting](#).
- Added a new entry to the [Troubleshooting](#) section for the Cloud Storage Service (and a new Index entry under "Troubleshooting" to help you find that section!). The new entry is about what to do in the unusual cases when databases on different computers become out of synchronization with each other, so they have different data.
- Preliminary testing-only release of the **Database ⇒ Import ⇒ PayPal Donations** [menu option](#). For now, all it does is allow you to enter your PayPal credentials for direct access, retrieve your December 2021 PayPal transactions, and optionally email them to Software4Nonprofits for analysis. The purpose of that is to help us design a feature for directly importing such PayPal donations into donors and donation in DONATION, by analyzing a number of users' downloaded transactions.

**Release 5.02e (February 11, 2022):**

- Fixed a bug in the main [Email Sending Configuration](#) window that happens if you switch back from Gmail-Specific Authorization to Normal Server Authorization, and then click **OK** to save that change and close the window. The next time you opened that Email Sending Configuration window, the window would show an empty area in the middle, rather than showing your saved email settings.

**Release 5.02d (February 9, 2022):**

- Fixed a possible problem with [Gmail-Specific Authorization](#) if you have an extremely long email address, where it could give messages about certain settings being too long.
- Prevented an error in [Custom Reports](#), the [SQL Select](#) window, and in running [Memorized Reports](#) that were based on Custom Reports or SQL Selects, that could incorrectly give a message about "Error executing the SQL SELECT statement", with no further helpful details, if the SELECT statement you were executing returned more than 32,767 rows of data.

**Release 5.02c (February 7, 2022):**

- If you try to make a [backup](#) to a location on your computer's hard drive, you always get a message explaining that that is dangerous, in case your hard drive dies, and it would be better to backup to a USB memory key or elsewhere. You are then asked whether to do it anyways. The default response on that question has been changed from Yes to No, to better prevent you from doing that!
- Fixed a bug where after entering and saving your first donor, as a new user starting with an empty database, its details don't appear in the Donor Details area. Then if you immediately try to enter a donation and save it, you get a techie error message starting with "Error at line 15 in clicked event of cb\_save\_donation", and then the program exits after prompting to email it to us. Fortunately when you then restarted the program everything was fine.

**Release 5.02b (February 7, 2022):**

- Fixed a bug in the changes to [Recurring Donations](#) in Release 5.02: if you had more than one different recurring donation to be inserted, you would get a series of error messages starting with one with the title bar "Data Entry Error" and text "Expression is not valid", and the recurrences would not be inserted.

**Release 5.02 (February 4, 2022):**

- Improvements to [Recurring Donations](#):



- Their Start Date can now be in the past, so that they will cause recurrences to be entered prior to the current date.
- When there are multiple occurrences of a given donation that need to be inserted when you start the program (whether because the Start Date was in the past, or just because you haven't run the program for a while), they are now inserted all at once, instead of requiring you to confirm them one by one, and then continue on to the next batch of recurrences.
- Fixed a bug for users who also use ACCOUNTS on the same computer, whose ACCOUNTS database filename includes a single quote (apostrophe) character: several places in the DONATION that attempt to read data from the ACCOUNTS data would fail to do that. (They were trying to read either lists of income accounts, when you are setting up for Bank Deposits, or lists of bank accounts, when you are creating Bank Deposits.) Instead, they would pop up a small window asking for Firebird ODBC Connect credentials, which you would have to cancel. That would then be followed by an error message about being unable to connect to the ACCOUNTS database, and possibly another technical message later.
- Added a paragraph in the Help topic on [OnDemand User Management](#), under the heading "OnDemand Login Passwords", about how you can't change your own password, and what to do if you need it to be changed.
- Fixed two bugs in [Custom Reports](#) for reports covering a range of years (specified with the From and To year controls):
  - If the range was only 2 years, and the later To year was not the current working year, and if there were donors in the earlier From year that were not in the To year, you would not be prompted to copy them up to ensure the report was complete. Now you are.
  - If you chose only Donation fields, or only Receipt fields, and no Donor fields, and also selected to report on a range of years that could cause it to prompt for copy donors from previous years forward to the To year if they were missing, it would give you that prompt. Such copying could not be needed if there were no donor fields in the report, so that prompt now no longer happens.
- Fixed two similar bugs in [Importing Donors and Donations](#) from One File:
  - If you specified that the Unique ID for matching to existing donors was the Member/Envelope #, and you were importing both that and the Email Address, and the Email Address was lower down in the list of Fields to Import than the Member/Envelope #, it would instead use the Email Address as the Unique ID. That would likely lead to unexpected results, especially when different donors share the same email address.
  - If you specified that the Unique ID for matching to existing donors was the Email Address, and you were importing both that and the Member/Envelope #, and the Member/Envelope # was lower down in the list of Fields to Import than the Email Address, it would instead use the Member/Envelope # as the Unique ID. That would likely lead to errors (if some donors didn't have Member/Envelope #s, or there were duplicates of the Member/Envelope #) or at least unexpected results.
- When converting data from [The Church Assistant](#), [Geminon](#), [GiftWorks](#), [Viansoft](#), [Membership Plus](#), [PowerChurch Plus](#), or [Roll Call](#), avoided error messages that would prevent the conversion from completing if a donation category or donor category value contained a double quote character (").
- Made a change that could prevent a technical error message and crash (which we could not replicate ourselves) in the [Email Sending Configuration](#) main window, possibly when switching between "Use Normal Server Authentication" and "Use Gmail-Specific Authorization". (The error was "Error at line 16 in wf\_validate\_and\_save event of w\_smtp\_options.")

**Release 5.01d (January 20, 2022):**

- Fixed a bug in [Importing Abundant Donations](#) that caused it to always give an error message about "Error retrieving web page" followed by another about "Could not retrieve Abundant donation reconciliation file ...".
- Since all @telus.net and @telusplanet.net email addresses are now served by Gmail servers, the verification etc. in the [Email Sending Configuration](#) windows has been changed to use Gmail settings for them. This also means that you can use the [Gmail-Specific Authorization](#) option for them. (Note: This actually was not correctly done in this release. It works in release 5.03b.)

#### **Release 5.01c (January 18, 2022):**

- Made a further fix to [Importing Abundant Donations](#): previously, after successfully downloading and importing files, it would delete those import files from the server (though not from your computer). Now it doesn't delete them from the server, just in case they are needed again for some reason.
- Made some fixes to the [Gmail-Specific Authorization](#) option in [Email Configuration](#):
  - It now catches some cases when there is missing information that would have generated very technical messages, give better messages instead, and can sometimes automatically reset the authorization to correct the problem.
  - If you switch back from Gmail-Specific Authorization to Normal Authentication, after a prompt to confirm you want to do this, your Gmail authorization settings are now cleared, so that if you switch back to Gmail-Specific Authorization again, you can start fresh.
- Corrected some messages that could come up in unusual situations, if the program had downloaded an installation file (for instance, with [Check for Updates](#)), and then was unable to run that installation. Previously some of those messages told you to find the file with the **Tools ⇒ Explore Data Directory** menu option, when in fact the file was in your Temp directory - the messages have been corrected to tell you to use **Tools ⇒ Explore Temp Directory**.
- Fixed a minor problem in **Reports ⇒ Fiscal Year ⇒ Summary by Category**: the amounts for each category were shown as plain numbers with 4 decimal places instead of in your standard currency format. (The grand total was shown properly with the currency format.)
- *This is primarily a note for our own staff, to remember when this change was made, because it will not affect users of the program in any noticeable way:* Made a change to how the program accesses secure services on the Software4Nonprofits.com website, that should prevent future "Error 106" problems like the ones that started happening for many users on September 30, 2021, and were fixed by changes in Releases 4.59d and 4.59e. (The affected services included Internet Backups, connecting with the Cloud Storage Service, doing Check for Updates, and requesting license keys.)

#### **Release 5.01b (January 13, 2022):**

- Made a further fix to [Importing Abundant Donations](#): if a donation reconciliation file that needed to be downloaded and imported was for some reason not present on the server where it needed to be downloaded from by the program, you were not getting appropriate error messages. Now you do get an informative message (telling you to report it to us) and the process stops immediately at that point.
- Fixed a problem where if you configured your [email sending](#) with the new [Gmail-Specific Authorization](#) option, and also in the [Receipt Options](#) window you checked "Bcc: to yourself", it did **not** send the Bcc to yourself when you sent emails to donors (such as for receipts) - it only sent the email to the donor.



**Release 5.01 (January 11, 2022):**

- Made a number of fixes to [Importing Abundant Donations](#):
  - It now works properly around a year-end. Previously you were very likely to get stuck with incorrect messages preventing you from doing the importing, either to the final Abundant donations at one year's end, or to the first donations in the next year.
  - If users split their donations into multiple parts, with different Funds (donation Categories) and/or different Memos (donation Descriptions), only the first split line would be imported. Now they are all imported.
  - The window showing the donations to be imported now also shows the Description field.
- Changed the Find Donor window so that if you move it to somewhere else on your screen, the next time you open it, it appears at that same location.
- Fixed two bugs about changes to the Receipting Person name:
  - If you made the change in the **Maintenance** ⇒ **Receipt Options** [window](#), it might not affect all of the places it should affect until you exited the program and restarted it, or did certain other actions.
  - If you made the change either there or in the **Maintenance** ⇒ **Organization Info** [window](#), and you were using the Standard version of DONATION, and you created a sample receipt (or created a real receipt but it didn't get saved, because you didn't print it, Save it to PDF, or email it), it would show the change. But if you then created another receipt, it would show the previous value of the Receipting Person name, from before your change! Exiting the program and restarting it also fixed this problem.

**Release 5.00b (December 22, 2021):**

- Fixed a number of issues, introduced by Release 5.00, that could prevent users from requesting license keys or evaluation extensions for the OnDemand version, or the upcoming subscription versions of the Standard or Local Network versions. The problems could also cause various incorrect messaging for OnDemand and subscription users whose support had expired.

**Release 5.00 (December 7, 2021):**

- This is the first release of the Standard and Local Network versions where, if you have made a payment on or after January 1, 2022, and gotten an updated license key after that, they will become subscription versions (that stops working after that payment expires, plus a 30-day grace period) . The OnDemand version has always been a subscription version.
- We have confirmed that DONATION works on Windows 11.
- Fixed a bug that could generate a technical error message including the text "Error at line 7 in gs\_grid\_ds\_from\_any\_sql event of gs\_grid\_ds\_from\_any\_sql: Cannot assign object of type transaction to variable of type nvo\_transaction ...", when doing conversions from [GiftWorks](#) or [Geminon](#) data, preventing the conversions from working.

**Release 4.60 (November 18, 2021):**

- When you are doing your [Email Sending Configuration](#) for the first time, if you configure it in the first window from an email address from a known email provider or ISP, or from your email client program such as Outlook, then when you get to the 2nd window, there may be some new helpful messages. If it's a Gmail address, you will receive a recommendation to use the new option [Use Gmail-Specific Authorization](#), and if it's any other email provider

where we have some special information about extra configuration requirements, you will be given an option to go to the section of our web page [www.software4nonprofits.com/smtplist.htm](http://www.software4nonprofits.com/smtplist.htm) that shows the relevant details.

- Most messageboxes in the program now show a small camera button in the bottom right corner, similar to the camera picture that was added a while ago on most windows in the program. If you click that camera button on the messagebox, nothing happens immediately, but when you return from the messagebox by clicking OK or whatever other regular buttons are displayed on it, you will be prompted to email a [screenshot](#) of the messagebox to us. After you do that, the program will continue as normal.
- Fixed two bugs when you are [Importing Donors and Donations](#), which may also be bugs if you are only [Importing Donors](#) or [Importing Donations](#):
  - It would not import more than 32,767 donors from one file.
  - It would give error messages if you were matching for duplicates on the email address, and any of the email addresses to be imported contained dashes, like daniel-cooperstock@whatever.com.
- If you [uninstall](#) the program, it now no longer asks you whether to also delete your database file (DONATION4.DB), because that is dangerous if you uninstall when you should not be doing so. It also now gives you a message telling you the two directories that will still be left over after the uninstall, and that you can manually remove them and their subdirectories if you are **positive** you will never be using DONATION again.
- When you submit a registration from the program, or set up your Unique ID for Internet Backups and let it email that information to Software4Nonprofits, both of them now include your Release # of DONATION, so that we can know how up-to-date your software is.

#### **Release 4.59h (October 30, 2021):**

- This note is primarily for Software4Nonprofits staff to know when we made this technical change. Restored an index on the database table that holds bank deposits that was deleted as part of release 4.59g. This index detects and prevents incorrect duplications of data (that could only happen due to bugs).

#### **Release 4.59g (October 30, 2021):**

- Fixed a couple of subtle problems with [Abundant Bank Deposits](#): Allow multiple bank deposits with the same Abundant batch # as long as they have different dates. When there are such multiple bank deposits, fix a bug where all of the donations on both dates could get associated with just one of those bank deposits.
- Removed an old database index that should not have been there, which could cause technical error messages (including the text "Attempt to store duplicate value ... in unique index IDX\_BANK\_DEPOSITS") when saving [regular](#) or [Abundant](#) Bank Deposits.
- This note is primarily for Software4Nonprofits staff to know when we made this technical change. On the rare cases when a database structure update that is part of an update to the program fails, you are given an option to go back and try again starting at an earlier structure update. That did not always work - it would sometimes get stuck on trying the same updates rather than going back to an earlier one. Now that is fixed.

#### **Release 4.59f (October 28, 2021):**

- Prevent a minor issue for users of the [Cloud Storage Service](#) introduced some time ago: even if you did nothing in the program, or only looked at data without making any changes, it

would always upload a backup of your database back to that Service on exit. It was only supposed to do that if you made changes. That was not harmful, but was unnecessary.

- Fixed a bug when adding [subtotal breaks](#) to the SQL Select window (often based on a [Custom Report](#)) where in many cases it could generate incorrect SQL that would not run.
- Fixed a bug that gave an incorrect Internal Error message, and prevents the ability to save [Abundant Bank Deposits](#) when there are undeposited transactions in Abundant batches with more than one date received within the same batch.

#### **Release 4.59e (October 1, 2021):**

- Better solution than the temporary one in release 4.59d, to prevent "Error 106" errors that many users were getting when doing Internet Backups, connecting with the Cloud Storage Service, doing Check for Updates, and perhaps a few other parts of the program.

#### **Release 4.59d (September 30, 2021):**

- Put in a temporarily work-around to prevent "Error 106" errors that many users were getting when doing Internet Backups, connecting with the Cloud Storage Service, doing Check for Updates, and perhaps a few other parts of the program.

#### **Release 4.59c (September 20, 2021):**

- When exporting [regular](#) Bank Deposits for importing into ACCOUNTS or QuickBooks, in the unusual case where a split amount in the transaction is negative, prevented it appearing in the file with two minus signs preceding it, which might not import successfully.
- When exporting [Abundant](#) Bank Deposits for importing into ACCOUNTS or QuickBooks, corrected the signs of the split lines - the transactions had been unbalanced, and would not import, since a bug introduced in release 4.54b! Also fixed the internal unique IDs assigned to each transaction to prevent inappropriate messages about duplicate imports when importing a file containing several days' deposits.

#### **Release 4.59b (September 16, 2021):**

- Fixed a bug with the new [screenshots](#) feature, that meant that for some users with versions of Windows prior to Windows 10, and certain zoom and scaling factors (like 125%), the screenshots were of the wrong area of the screen and thus not helpful!
- Fixed a bug for [Limited Users](#): if you did any data entry on the main window (such as entering a donation), after you Saved that, the Maintenance menu would remain disabled. It should have been disabled during the data entry, but re-enabled when you finished. This bug did not happen if you used the [Batch Entry](#) window.
- Fixed a small bug in messageboxes from the program, for users whose computers are set to use certain languages other than English (for instance, Simplified Chinese) where a question mark would appear on what should have just been blank line.
- For the [menu option Database ⇒ Import ⇒ From PowerChurch Plus](#), if the program cannot find where your PowerChurch Plus data files are automatically, it now prompts you to select the drive and directory where they are located. Also corrected a problem that could lead to it being unable to connect to the data files.

#### **Release 4.59 (September 7, 2021):**

- Users of the versions that allow for simultaneous users (Local Network and OnDemand) can now change the program's [working year](#) when other users are also running the program. In that situation your year change will only be temporary, during that run of DONATION, and will not affect other users. (Previously the year could only be changed when only one user was running the program, and the change would then affect any other subsequent users.)
- Fixed a bug in the integration with [Abundant](#), that could cause the same transaction to be imported twice when you use the **Database ⇒ Import ⇒ Abundant Donations** [menu option](#).
- Added the menu option **Tools ⇒ Turn Debug Mode On**, which gives you an option to temporarily turn what is called "Debug mode" on in the program, if we have asked you to do so. Doing that causes certain debug messages and logging to occur, to help us solve problems you are having.

#### **Release 4.58b (August 24, 2021):**

- For OnDemand users, prevented a possible but very unlikely error, where actions that are not allowed while more than one user is logged in, such as restoring a database backup, would still be allowed.
- For OnDemand users, fixed a bug preventing the following feature introduced in Release # 4.57 from working. (It instead gave an error message.)
  - When you are configuring accounting program accounts corresponding to donation categories, for [bank deposits](#), and you also have our ACCOUNTS program installed, then if possible the Account field will now turn into a drop-down list of the Income accounts from your ACCOUNTS database. Also, in the actual Bank Deposit entry windows (for [cash and cheques](#) etc., or for [Abundant donations](#)), if you also have our ACCOUNTS program installed, if possible the Deposit to Bank Account field will have a drop-down list of your Bank accounts in ACCOUNTS, and if the Advantage Account field is displayed, it will have a drop-down list of your Income accounts in ACCOUNTS.

#### **Release 4.58 (August 20, 2021):**

- Added new alternatives in the main configuration [window](#) of **Maintenance ⇒ Email Sending Configuration**: radio buttons to choose between **Use Normal Server Authentication** (which is what the program has always done up to now), and **Use Gmail-Specific Authorization**, which is a special option for Gmail accounts, and accounts using email addresses on your organization's domain using Google Workspace (formerly called G Suite). Details on the new Gmail option are in the [Gmail Configuration](#) help page.
- Added a more detailed section about [transaction fees](#) to the overview Help topic for Abundant.
- Put in more helpful details about how to do [split receipting](#) for users in the U.S.A.
- Since the [Remote Database Version](#) was discontinued on August 1, 2021, removed most of the references to it and Help about it in this Help file.
- The program can now [convert from Membership Plus](#) version 4. Previously it could only convert from versions 5 and higher.
- Fixed a bug, when you are [importing donors](#), or [importing donors and donations](#). The bug only happens if you specify that the Email address is the unique donor identifier, and you are updating or ignoring existing records based on that, and you are also importing the Member/Envelope # field. In that case, if a row in the import file matches an existing donor on both that Email address and the Member/Envelope #, you got an incorrect error message about adding a duplicate Member/Envelope # - which should have been allowed, since it was just an update to the same value.

**Release 4.57 (July 28, 2021):**

- You can now add subtotal breaks and subtotals to reports created with [Custom Reports](#) or directly with the [SQL Select](#) window, in addition to the grand totals that they already included.
- When you are configuring accounting program accounts corresponding to donation categories, for [bank deposits](#), and you also have our ACCOUNTS program installed, then if possible the Account field will now turn into a drop-down list of the Income accounts from your ACCOUNTS database. Also, in the actual Bank Deposit entry windows (for [cash and cheques](#) etc., or for [Abundant donations](#)), if you also have our ACCOUNTS program installed, if possible the Deposit to Bank Account field will have a drop-down list of your Bank accounts in ACCOUNTS, and if the Advantage Account field is displayed, it will have a drop-down list of your Income accounts in ACCOUNTS.
- When prompting to [save a PDF file](#), the program will now never offer an Append option if an existing filename is selected, when what you are saving to PDF is a mail-merge letter. This change is designed to prevent errors if you accidentally append one donor's letter to another donor's letter, then send that to one of those donors. (Appending was already not allowed for all receipts.) So now appending to existing PDFs is only allowed for reports.
- Added a new Help topic on [Salutations for Donors](#), which gives suggestions for how to set up the salutation in [mail-merge letters](#), if you want it to use the first name, but you are recording couples with different last names in the same donor record.
- Changed the "Year Received" donation field in [Custom Reports](#) to give the same values, but no longer automatically generate a sum of the Year values in each row of the report at the bottom of the report!
- We also failed to mention in the notes below for the change from the Custom Reports fields "Month # Received" and "Quarter # Received" to "Month Received" and "Quarter Received", in release 4.56, that that also prevents them from automatically getting totals at the bottom of reports.
- Also in Custom Reports, you are now not allowed to include more than one full name field, such as any of the fields Name, Name with Title, etc., and Reversed Name etc., both because it doesn't make much sense, and because it could cause some problems if you wanted to add subtotals to the report. You can still include as many individual name fields as you want - Business Name, Title, First Name, Middle Initial, and Last Name.
- If you have set up [automatically recurring](#) memorized donations, and you have not used the program for a fair while, there is a potential issue - you could have to accept a bunch of recurrences before you can get into the program. Now, if you are in that situation, after each set of recurrences is inserted, you are given an option to continue with further recurrences, or stop for now, and have them inserted the next time you start the program.
- Fixed a bug for users of [Abundant](#), in the **Maintenance** ⇒ **Donation Categories** [window](#). If you deleted a category that was marked as being for Abundant, it wasn't removed from the online list of Abundant funds, unless you afterwards made other changes in that window and clicked **Save** to save them. (Any **Save** in that window always updates the entire current list on Abundant to match the list with Abundant checked in the window.)
- Prevented a crash, with the message "Error at line 155 of wf\_retrieve event of w\_report" if you do a [One Date Donation](#) report, then use the **Save SQL** button, followed by possibly editing the saved SQL, then use the **Load SQL** [button](#). (Having said that, One Date Donation reports are ones where there is very unlikely to be anything helpful you could do with those features!)

**Release 4.56b (July 5, 2021):**



- (This was actually added in release 4.56.) When you click a **Save PDF button** or equivalent menu option for a report, receipt, or mail-merge letter, and you choose to save it to a file that already exists, you now get an option to Append the new PDF to the existing file, as well as the previous options to replace the previous file, or cancel the save.
- In release 4.56b, do **not** offer that Append option for **Save PDF** if it is a receipt, to avoid any risk that you will append a PDF of one donor's receipt to an existing PDF of a different donor's receipt, and then send them both to one of those donors!

#### **Release 4.56 (July 5, 2021):**

- Added [Automated Reports Running Scripts](#), run through **Reports ⇒ Run Reports Script**, which allow you to write fairly simple scripts in a text file, to do automated jobs including running one or more reports, filtering them, sorting them, saving them to various file formats, and emailing those saved files to anyone.
- In the **Maintenance ⇒ Receipt Options window**, allow the selection of Letter versus Legal paper size (or A4 for users in countries other than Canada or the USA).
- Made 3 changes to the Donation fields list in the [Custom Reports](#) window:
  - Changed "Month # Received", which just gave the month of the date received as a number (1 to 12), to "Month Received", that gives it as values "01 - January" through "12 - December".
  - Changed "Quarter # Received", which just gave the quarter number of the date received (1 to 4), to "Quarter Received", that gives it as values "Q1" through "Q4".
  - Added "Year Received", which just gives the year number of the date received. This could be used in multi-year reports, although using the controls in the Multiple Year Totals area of the Custom Reports window is an alternative way to do that.
- Fixed a bug in the [Report Browser](#): DONATION REPORTS ⇒ Current Donor ⇒ All Years Details was incorrectly printing the same report as DONATION REPORTS ⇒ Current Donor ⇒ Current Year Details.
- For [OnDemand](#) version users, fixed a weakness that you weren't being notified, and shown this Revision History page, when the program had been upgraded since you last used it. (Unlike all other versions, we do the upgrades to your OnDemand version programs when they are available, so you don't have to.)
- Fixed a bug that happened if you were [emailing](#) mail-merge letters or receipts, and the Name of a donor included a double quote mark ("). It would give an error message about the name not being found in the merged document, and fail to email.

#### **Release 4.55b (June 11, 2021):**

- Made some important fixes in the importing option for users switching from the [PowerChurch Plus](#) program into DONATION, that was introduced in the previous release.
- Various routines for conversion from other programs, or importing data, used to show any errors or issues you would need to fix in the Notepad text editor program. Now they are shown in a window within DONATION, which makes things a little simpler.
- Fixed a few menu options in the [mail-merge editor](#), such as **Insert ⇒ Table**, which if they were the only changes you made, would allow you to close the editor without being prompted to save your changes.
- Added some details about the requirements for PCI compliance if you use the [Abundant](#) online donation system.

#### **Release 4.55 (June 7, 2021):**

- Added an importing option for users switching from the [PowerChurch Plus](#) program into DONATION.
- Users of the [OnDemand](#) version can now be given an access level of "No Access" to a database, in the [Administer All Users](#) window. This would be helpful for OnDemand clients with multiple databases, where some users should only have access to some of the databases.
- Users of the [Remote Database](#) version will now receive a message, each time they start the program, telling them how many days are remaining until that version is discontinued (on August 1, 2021), before which they have to switch to the Standard or OnDemand version.
- Fixed a weakness for users switching from later versions of [Membership Plus](#) into DONATION. It needed to download and install an extra component (an ODBC driver) for this conversion to be done, but when the program tried to run that downloaded installer, it would fail, and you would have to run it manually. Now it should run automatically.
- Fixed a crash in the [mail-merge editor](#), if you used the **Insert** ⇒ **Table** menu option. It would crash with an error about "Error at line 7 in open event of w\_base".

#### **Release 4.54e (May 26, 2021):**

- Changed the **Database** ⇒ **Import** ⇒ **Donations** [menu option](#) and the **Database** ⇒ **Import** ⇒ **Donors and Donations** [menu option](#) to handle French dollar amounts, which could have the dollar sign at the end, spaces for thousands separators, commas instead of periods for the decimal point, and semicolons instead of commas separating fields, when Excel files are saved to CSV for importing.
- Added links to see the US\$ and C\$ transaction processing fees into the [Abundant Overview](#) help page.
- Undid a change in release 4.52e that could create error messages such as "Internal error: trying to add the key ... a second time to an nvo\_keyvalue object." While the change that caused those messages is not known to have affected the behaviour of any functionality in the program, it could possibly have done so.

#### **Release 4.54d (May 18, 2021):**

- Changed things so that license key requests for Organization Names with non-Roman characters, such as Chinese or Hebrew, should work properly.
- This note is primarily for Software4Nonprofits staff to know when we made this change - it should not affect users! When the Remote Database version is downloading its database to become a local database, permissions are no longer granted by the program to the database usernames that the Standard and other versions use, but the Remote Database version does not use. That is because the process of doing the backup on the server, that gets downloaded to the local PC, grants those permissions instead.
- Added a section to the [Abundant Overview](#) help topic about setup for users with multiple databases.

#### **Release 4.54c (May 10, 2021):**

- Corrected the name of ByTheBook's [Roll Call](#), that DONATION can convert from - we had been spelling it "RollCall", without the space.
- Fixed a crash in the Lite version, if you tried to use any feature that is not included in it, which should have brought up a window explaining about that. The bug was introduced in release 4.53.



**Release 4.54b (May 7, 2021):**

- Fixed a change in release 4.53, which caused [Bank Deposit](#) transactions exported to [QuickBooks](#) (QB) to fail to be imported. It turns out that the transaction type field in the exported .IIF file for QB has to be "DEPOSIT", even though such deposits get shown with the type "DEP" after importing. In addition, the "NAME" field in those .IIF files, which we understood would go into the PAYEE field in QB, was being ignored. We have added a "MEMO" field, with the same value (such as "Deposit from DONATION") that will get imported so that you can see what it is. (It is not clear that there is a way to get QB to import a PAYEE when it is importing deposit transactions.)

**Release 4.54 (May 6, 2021):**

- Added an importing option for users switching from the [Roll Call](#) program into DONATION.
- Corrected an error in the initial setup of the [Abundant](#) online donation system.
- Fixed a bug where changes made in the **Maintenance** ⇒ **Organization Info** [window](#) didn't show up in various places (including receipts) until you exited the program then restarted it.

**Release 4.53b (May 3, 2021):**

- Changed a place where the new feature that can add automatically take a screenshot of unexpected messageboxes, and then prompt to email them to us after you click a button on them, was being set incorrectly. The effect of that was that the next regular (not unexpected) messagebox included the text saying it was going to take the screenshot and offer to email it to us, when it should not have done so. Also changed the text added to the messagebox in the unexpected cases, explaining that a screenshot will be taken, to be entirely bold, to make it more obvious.

**Release 4.53 (April 30, 2021):**

- The [Abundant](#) online donation system is now tightly integrated into DONATION. The integrated features include launching the setup of Abundant from DONATION, importing automatically downloaded daily donation batches, and creating the bank deposit accounting transactions for those batches.
- Most windows in the program now have a small camera icon in some corner of the window. Clicking on it automatically saves a screenshot of that window to a file, then brings up a window that allows you to email the screenshot to us, with your comments. Some technical messageboxes also have a similar mechanism for emailing them to us. See [Screenshots for Tech Support](#) for full details.
- When [Bank Deposits](#) are exported to files for importing into [ACCOUNTS](#) or [QuickBooks](#), the transaction type had always been "DEPOSIT", which is different from the standard transaction type that both of those programs use for deposits, which is "DEP". It has now been changed to "DEP" in those exported files.
- The **Maintenance** ⇒ **Email Sending Configuration** [window](#) now allows you to use Port 587 or 465 with the Security option None (after warning you that it is unusual), if it is allowed by your email provider.
- Fixed a bug in the One Date Batch Entry Options [window](#), where if you don't have "Include existing donations for the specified date" checked, the Batch Description gets filled in as "All" instead of the time, and then that isn't accepted when you click **OK**.

- Some users have been having problems with updated versions of the helper file HtmlMessageBox.dll not being installed when they do upgrades, likely due to interference from their anti-virus software. (We can assure you there is nothing wrong with that file!) The program now checks on startup that that file is present, and is as up-to-date as it should be.

#### **Release 4.52e (April 9, 2021):**

- Fixed a problem causing selecting and editing of [logo and signature images](#) to fail, with an error such as "It appears that a 3d-party Image Viewer control installed with DONATION, that is needed for this feature, needs to be reinstalled". Reinstalling did not fix the problem, but updating the program to the current release does fix it.

#### **Release 4.52d (March 24, 2021):**

- Changed a lot of places in the program that accessed web pages or utilities (such as for requesting license keys) on our website, that were using insecure web pages (http://...), to instead access the same pages securely, with https://... addresses.
- Fixed a technical problem where some stored procedures in any new databases created recently were not absolutely correct. This problem would have been very unlikely to affect any users, but for technical reasons it was important to fix it.

#### **Release 4.52c (March 4, 2021):**

- Fixed a bug in the **Maintenance ⇒ Recurring Donations** [window](#): If there was a row there with the name "MISSING DONOR!", which means it was for a donor that has been deleted from the current year, or not copied forward from a previous year, and you clicked Edit, you got an error message and the program crashed. Now you get a message explaining the situation, and recommending that you delete that row.

#### **Release 4.52c (March 4, 2021):**

- Prevented a harmless error when switching to a different database, with the **Database ⇒ Switch Databases** [menu option](#) for the first time after upgrading to release 4.52 or higher, that said "Internal error inserting row into CONSTANT\_TEMP table ...". This error could also come up after restoring a database backup made by an earlier release.
- Made a correction to the validation of the Username field in the main **Maintenance ⇒ Email Sending Configuration** [window](#) that was previously allowing various sorts of invalid email addresses and parts of email addresses. (What's supposed to be in that field is either an email address, or the part of an email address prior to the "@" sign.)
- Fixed an error in the window for associating accounting accounts with donation categories (part of [configuring bank deposits](#)) that could give an error message that starts with text like "The donation category NAME is set to be allowed for online donations via Abundant, but you have not specified an accounting Account for it." That will be part of an upcoming feature, which offers a tightly integrated online donation system called Abundant for use with DONATION, but was not supposed to be active code yet.

#### **Release 4.52b (Feb 26, 2021):**

- Fixed a bug introduced by Release 4.52, where you could not create a new year for the first time in the **Maintenance ⇒ Change Year** [window](#), even when you were using a single-user

version of the program (Lite or Standard) or were the only simultaneous user in a multi-user version.

- When you are editing your SMTP settings in the **Maintenance ⇒ Email Sending Configuration** [window](#), there are now additional validations done and warning messages that can appear if the settings you have entered do not match our best knowledge of the correct settings for your email address' domain (the part after the "@" sign) or your entered SMTP Server value.

#### **Release 4.52 (Feb 25, 2021):**

- [Recurring donations](#) can now be bi-weekly (every 2 weeks) in addition to weekly and monthly.
- Further improvements for users of the [OnDemand](#) version who have been trying to open files from, or save files to, the C: drive, which is the OnDemand server's drive. Your local computer's C: drive shows up as J: under OnDemand, with subsequent drives like USBs showing up as K: or L:. All File Open or File Save type dialog boxes now give you warning messages if you navigate to a folder on the C: drive, telling you to use J: etc. instead, and prevent you from clicking Open or Save if you are in a folder on the C: drive.
- Message boxes that have a Help button on them now work in a more convenient way: the Help file is opened immediately, and you can switch between it and the program. Previously, you had to close the Help file that was opened, before you could resume working in the program.
- Fixed the fact that the Help button in the **Database ⇒ Import ⇒ Donors and Donations** [menu option](#) was not going to the right Help page.
- Fixed a bug in the versions that allow for simultaneous users (Local Network, OnDemand and Remote Database) where if you created receipts but didn't print them, save them to PDF, or email them, they were still saved back to the database, despite a message saying that they were not being saved! This bug was apparently introduced in Release 4.39, in September 2020.

#### **Release 4.51d (Feb 17, 2021):**

- Put in a better fix (than the one in release 4.51c) to a problem introduced by release # 4.51b, where a small number of users doing updates got error messages about not being able to create a Global Temporary Table. If that problem is encountered, the program now prompts you through automatically backing up and restoring your database, which fixes the problem.
- For the Standard, Lite, Local Network Server, and OnDemand versions of DONATION, if your database file does not exist when the program starts, it will now be created by copying from an empty database installed with the program. (This is particularly for new users of [OnDemand](#), to ensure that they get an up-to-date empty database to start with.)
- Users of the [OnDemand](#) version who try to save files such as backups, PDFs, data exports etc. to the C: drive, which is the OnDemand server's local drive, not their own computer's local drive, are now given a message about that not being allowed, and asked to try again. (Under OnDemand, your local computer's C: drive shows up as J:, and additional local drives, like USB memory keys, show up as subsequent letters like K: etc.) There's also a message warning you about that before you try to do any database restores.
- If you start the program and your licensing file donsl.txt is not present in the program's [Data Directory](#), it is now automatically created, with data in it that starts a 60-day evaluation period starting on the current date. This is particularly for the [OnDemand](#) version, to make sure that

new users start with an appropriate evaluation period, because their setups never have that licensing file pre-installed.

#### **Release 4.51c (Feb 12, 2021):**

- Fixed a problem introduced by release # 4.51b, where a small number of users doing updates got error messages about not being able to create a Global Temporary Table. If that problem is encountered, you now instead get a detailed message telling you what to do to fix it, which is basically making a database backup then immediately restoring that backup.

#### **Release 4.51b (Feb 12, 2021):**

- Fixed a problem in the [mail-merge editor](#), where when you used the **Insert** ⇒ **Page Break** menu options, the visible page break text and line that appears on your screen also appeared when you printed or saved to PDF, at least for some users who did that recently. If you have that problem in an existing mail-merge template, please write to us for a fix.

#### **Release 4.51 (Feb 10, 2021):**

- In the **Reports** ⇒ **Custom Reports** [window](#), renamed "Batch" in the Donation fields list to "Batch Description" to be clearer what it means. That field is only shown if you have checked "Use Batch Descriptions" in the Donations tab of the **Maintenance** ⇒ **Main Window Options** [window](#).
- When you are using the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#) or the **Database** ⇒ **Import** ⇒ **Donors and Donations** [menu option](#), if you have donors with two email addresses in the Email field, separated by semi-colons, and you choose the option to use the Email address as the unique donor identifier, a single email address being imported can now match either of the two existing addresses.
- Made some changes in the OnDemand [User Management](#) Help page to reflect some changes to the User Management application.
- The **Tools** ⇒ **Check for Updates** [window](#) now has a **Print** button when an update is available and thus revision history is being displayed, to print that revision history.
- Fixed a bug where if the donation Description column was being shown with a drop-down arrow for the appraiser, and you used the **Correct** button, the Description field in the window that came up had a black background so you couldn't see anything you typed into it.
- Fixed a bug in the **Database** ⇒ **Import** ⇒ **From GiftWorks** [menu option](#): if you chose a GiftWorks backup file (one ending in ".gbf"), it would give an error during the extraction and renaming process and could not continue. (The error involved duplicating the path that it was stored in.)
- Fixed a bug where using the «DetailsTableAllCategories:...» merge field on a pledge letter (with pledge type Annual with Start Date and Category) for a donor with a pledge but no donations in the current year makes the entire resulting merge be blank in **Letters** ⇒ **One Letter**. It can also cause error messages when such donors are encountered in **Letters** ⇒ **Mass Mailing**.
- Put in some code to hopefully prevent an occasional error when exiting the [mail-merge editor](#), with wording like "... cannot convert any in Any variable to boolean. Possible cause: uninitialized value".

#### **Release 4.50h (Jan 27, 2021):**

- Some improvements to the [OnDemand](#) help topics.
- In the OnDemand Administer All Users [window](#), user names are now forced to upper case, to match the User Management application. (Logins can still be done with the user name in any case, though passwords have to be in the right case.)

#### **Release 4.50g (Jan 22, 2021):**

- Fixed a bug in [One Date Batch Entry](#): if you are showing Batch Descriptions, have already done one batch for a given date, and have "Include existing donations for the specified date" unchecked, and then you do another batch for that date, with a different Batch Description, it was instead incorrectly adding the donations you enter to the first batch for that date. Now it correctly puts it in a new batch with the description you entered.

#### **Release 4.50f (Jan 13, 2021):**

- Fixed a bug introduced by release 4.50e, where when you were creating a [bank deposit](#), and clicked the **Export** button, you would get an error "Error at line 112 in clicked event of cb\_export...".

#### **Release 4.50e (Jan 13, 2021):**

- Changed the program to default to using Chrome, when it is present, for generating PDFs from mail-merge documents (including in order to email them). It uses that instead of the novaPDF printer driver. (OnDemand versions already always used Chrome.) In case you experience any problems with this change, it can be turned off, except for the OnDemand version, with a new checkbox in the **Maintenance** ⇒ **Receipt Options** [window](#).
- Fixed a bug: when you are using the Donors Only [password](#) (or are a Donors Only user of the Remote Database or OnDemand versions) the layout of the main window was not correct, with a large blank area at the bottom of the window.
- For OnDemand, when it has to convert Excel files to CSV (for various importing features), some users were encountering error messages. This release uses a different external program to do that conversion.

#### **Release 4.50d (December 26, 2020):**

- Fixed a problem causing editing of [signature images](#) to fail, with an error that starts "It appears that a 3d-party Image Viewer control installed with DONATION, that is needed for this feature, needs to be reinstalled". Reinstalling did not fix the problem, but updating the program to the current release does fix it.
- For users of the cloud-based [OnDemand Version](#), added a warning when they are backing up, if they choose to back up to the J: drive, which is their local C: drive. This is similar to the warnings given to other users if they back up to their C: drive, that if it dies, they could lose all of their data.
- Technical point mostly for our internal memory: If you chose "Run DONATION" from the last screen of the installation program, it used to run it with elevated Administrator privileges, the same way the installer itself ran. That was different from how DONATION was normally run, and could cause some unusual errors during that first run done directly from the installer. Now if you do that, DONATION is run with your normal user privileges.

- Put in a fix in the **Tools** ⇒ **Check for Updates** [window](#), that may prevent an error message about "Error ... in destructor event of ole\_web" when the program is being closed in order to run the downloaded installation program.

#### **Release 4.50c (December 17, 2020):**

- Added a couple of further places explaining about our licensing and payment rules for multiple user with multiple databases, like the existing information about that [here](#).
- Added a check when the program starts up that it has all of the expected database permissions. There was a potential problem about that with our initial version of the instructions on the website for switching from the Remote Database version to the OnDemand version. (Those instructions have been changed to avoid the problem.)

#### **Release 4.50b (December 15, 2020):**

- Added instructions for automatic logins with the OnDemand client program to the [Command Line Arguments](#) page.
- Various additions and improvements to the OnDemand help pages.

#### **Release 4.50 (December 14, 2020):**

- This release introduces the entirely cloud-based [OnDemand Version](#), which runs on a server, through a small remote-control client program, and does not require installation of the DONATION program itself. Like the Remote Database Version, multiple users can access the same database at the same time, each with their own login, but it is **much** faster than the Remote Database Version.
- When you get errors [configuring emails](#) in **Maintenance** ⇒ **Email Sending Configuration**, the technical log file that is generated is now shown to you in a special window with a button on it that allows you to email it to us for our suggestions.
- In the **Database** ⇒ **Merge Duplicate Donors** [menu option](#), fixed an oversight that would have caused [Customer IDs](#) belonging to the donor being merged into the other donor to be deleted, rather than being moved to the other donor as they should have been.
- Made a fix that should prevent an error that came up to a few users occasionally, that said "Error at line 22 in wf\_display\_donations\_header event of w\_donation: Error accessing external property business\_name ...". (Restarting your computer seemed to always make that error go away.)
- When you are associating accounting account names to your donation categories as part of configuring [bank deposits](#), it does not work in either ACCOUNTS or QuickBooks if you precede the name by its account number. The program now warns you if it appears you are doing that.
- In the [Lite Version](#), the option to use a [Donors Only Password](#) had been accidentally allowed, which was not our intention. That option has been removed.

#### **Release 4.40b (November 17, 2020):**

- Fixed a bug where on new installations, the mail-merge letter and receipt templates would not be loaded properly into the program's database, and thus could not be used.

#### **Release 4.40 (November 14, 2020):**



- The Easy Tithe online donation system now has a special Software4Nonprofits export format for importing into DONATION. See [Importing Donors and Donations from Easy Tithe](#) for full details on doing that export from Easy Tithe and import into DONATION.
- [Backups](#) can now always back up to mapped network drives, and also to UNC paths (\computername etc.), except for the Local Network Client version. Restores can now always restore from mapped network drives, and also from UNC paths.
- All users of the [Remote Database Version](#) can now use the **Maintenance ⇒ User Administration ⇒ Administer All Users** menu option. However, only users who are Administrators can make changes in the window that comes up - everyone else can just see the information about the users.
- Fixed a bug that can cause an error message "Common Dialog Error: Error Number 65535" to come up when you use certain parts of the program that bring up a window for selecting a file to open, or specifying a file to save, if certain other parts of the program that also do that have been used first.
- Removed the **Backup/Restore ⇒ Restore Old Database (DONATION3.DB)** menu option, because it was only needed for conversion from version 2.70b or earlier of DONATION (released in 2007 or earlier), and almost no users should still need that. If you need that, [contact us](#) and we can do the conversion for you.

#### **Release 4.39c (October 13, 2020):**

- Fixed a small bug introduced by Release 4.38: If you pressed **F2** (or used **File ⇒ Edit New Donation**) before you had actually entered or edited any donations, it did nothing.
- Fixed an inappropriate error message when installing the [Local Network Client](#) version, where it would say "Could not copy file ... DONATION4.EMPTY ... Source file(s) does not exist...". (There was more text where the "...s were.) Clicking Cancel on that messagebox would allow the install to complete successfully.
- Fixed an error in installs of the [Local Network Server](#) version, on computers on which it had never been installed before, that could prevent the Local Network Client installs from succeeding. That error could be fixed by copying the file DONATION4.EMPTY on the Local Network Server computer, from the directory in which the program files had been installed, to the Data subdirectory of the program's [Data Directory](#).

#### **Release 4.39b (October 11, 2020):**

- Made a change that would prevent an error that started in release 4.39: If you used **Tools ⇒ Check for Updates**, and then when it prompted you to make a database backup before the update you answered Yes, it could give an error like "Error at line 12 in uf\_decode\_mapped\_drive\_file ...". If you are getting this error, and you want to make a backup before updating, please do it separately, then answer No when Check for Updates asks you about making a backup.
- The same error may have been able to come up if you did **Database ⇒ Validate**, or answered Yes if the program prompted you to validate your database as you were exiting the program, and also if you were restoring a database backup.

#### **Release 4.39 (October 8, 2020):**

- There are now special features for importing donations from the Vanco online donation service, including:



- A new option to allow working with Customer IDs (3rd-party identifiers for donors) in the Show Fields checkboxes of the [Donor Details](#) tab of **Maintenance** ⇒ **Main Window Options**.
- Once that option is selected, the following other features become visible:
- An **IDs** button in the row of buttons in the Donor Details area of the main window, for [maintaining](#) the Customer IDs for the currently displayed donor.
- A new report, **Reports** ⇒ **Donor** ⇒ **Customer IDs**, displaying all such IDs that have been stored in the program.
- A new **Database** ⇒ **Import** ⇒ **Vanco Donations** [menu option](#) for importing export files in a special "Software4Nonprofits" export format that you can ask Vanco to send you daily or weekly.
- Fixed a bug introduced in release 4.13: built-in receipts that should have been encrypted to allow them to be viewed and printed, but prevent them from being modified etc., were not encrypted. Mail-merge receipts were encrypted properly.
- A few releases ago, all **Database** ⇒ **Import** menu options that used to save Excel files that you specified as tab-separated text files before importing them, were changed to save them as CSV (comma-separated value) files before importing them. (We failed to record that in that release's points below.)
- Fixed an error that could be caused by that change to saving Excel files as CSV. It was trying to save as Unicode CSV files (ones that would handle many types of non-English characters), and much older versions of Excel could not do that. Now if a save from Excel to a Unicode CSV file fails, the program silently saves it as plain-text CSV instead.

#### **Release 4.38b (September 23, 2020):**

- Fixed a bug: In new databases created with new installs since the Middle Initial field was added as an option to the program, or additional databases created with **Database** ⇒ **Switch Databases** [menu option](#), mail-merge letters could give error messages about missing the MIDDLE\_INITIAL field.

#### **Release 4.38 (September 22, 2020):**

- Added a new **Database** ⇒ **Import** ⇒ **Donors and Donations** [menu option](#) that imports files with both donor and donation information on the same line. Completely revised our previous help topic on this (pointed to by the "menu option" link in the previous sentence) that required using both the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#), and the **Database** ⇒ **Import** ⇒ **Donations** [menu option](#) in turn to achieve that same effect.
- Revised the Help topics on importing from [PayPal](#) and from [CanadaHelps.org](#) to use the new **Database** ⇒ **Import** ⇒ **Donors and Donations** menu option.
- In the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#), and the **Database** ⇒ **Import** ⇒ **Donations** [menu option](#), if you are importing CSV files, there would be a problem if quoted fields in the input file were broken up over multiple lines of the file. (We saw this occurring in the MESSAGE TO CHARITY field in files exported from [CanadaHelps](#).) That is now fixed - multi-line fields in CSV files are now treated as if they were on one long line. This change also applies to the new **Database** ⇒ **Import** ⇒ **Donors and Donations** [menu option](#).
- In the **Database** ⇒ **Import** ⇒ **Donations** [window](#), the extra window for associating new donation category values with existing donation categories, or creating new categories for them, no longer comes up if the import is merely using previously saved conversions of such values. It only comes up if there are new categories that have not previously been converted to existing ones.

- There is a new **Maintenance ⇒ Imported Category Conversions** [menu option](#) that allows you to make edits to previously saved and remembered conversions of imported donation categories.
- Fixed a bug that can happen when you have the Sort Order on the [Donations](#) tab of **Maintenance ⇒ Main Window Options** set to "Oldest to Newest". If you make a change on the new empty donation row on the main window (which appears at the bottom of the list with that option), but don't fill in the Amount, and you also make a change on the previous row, then click **Save**, you get a techie error like "validation error for column DONATION.TOTAL\_AMOUNT, value \*\*null\*\*", and you cannot save your changes.
- Fixed two small bugs in validating the entry of a new donor with a name that was the same as an existing donor's name, which should cause the program to ask you if it's OK to add them despite the duplicate name. First, it wouldn't check that if the current donor selected on the Donor List was the one with the same name. Second, if the other donor with the same name had nothing in Address Line 1, instead of getting a proper confirmation message, you would get a messagebox just saying "NULL" and asking you to answer Yes or No!
- Made a change in the **Database ⇒ Import ⇒ PAR Donations** [window](#), that could prevent occasional crashes in the program after the import was finished. (Any such crashes would have been harmless - the import still completed successfully.)
- Fixed a bug: if you have selected an option, on the [Donations](#) tab of **Maintenance ⇒ Main Window Options**, to allow display of previous-year donations on the main window. The bug was that you could click the **Correct** button on a displayed receipted donation from a working year other than the current one, in which case you would get a techie error message and the program would crash. Now if you click **Correct**, you get an appropriate message if the donation is not in the current working year, telling you to switch to the required year if you need to correct it.

#### **Release 4.37d (September 11, 2020):**

- Fixed a crash in the program introduced by Release 4.36, with text like "Cannot create storage structure to hold mail merge data ...". It occurs in the **Letters ⇒ One Letter** [menu option](#) or **Letters ⇒ Mass Mailing** [menu option](#), when choosing the type Pledge Information and clicking **Merge**, but only if your Pledge Type on the [Pledges tab](#) of **Maintenance ⇒ Main Window Options** is anything other than "Simple Annual Pledge".

#### **Release 4.37c (August 12, 2020):**

- The drop-down list for the Cheque # / Paid By field for donations now includes a row for "<Add New>". If you select that, you are immediately put into the **Maintenance ⇒ Donation Paid By Values** [window](#), with its **New** button already clicked, to add a new value to the drop-down list. If you do add one or more values while you are in that window, the last one added will be immediately inserted into the Cheque # / Paid By field when you return from that window. (This feature was added because many users were asking us if we could please add things to that list, who had not discovered the menu option that allowed them to do it themselves.) See [Entering New Donations](#) for more details.  
**Warning:** If you do not have a Default Paid By value, so that the Cheque # / Paid By field comes up blank for new donations, do not just use the down arrow key to navigate through the list of options without actually dropping down the list by clicking the drop-down arrow. If you do that, because the first item on the list is always "<Add New>", that will immediately select that item, and then pop up the window for adding another Paid By value! Just using the arrow keys to navigate through the list of options is not efficient in any case: dropping

down the list and using your mouse to make selections, or typing the first letters of your desired selection until it comes up, are both far easier.

- There was already a similar "<Add New>" option for the donation Category field, but it was not enabled on the window for [correcting receipted donations](#). Now you can also use it there (as well as on the main window, and on the [Batch Entry](#) window).
- Added a Help topic on making [Screenshots](#) for tech support emails.

#### **Release 4.37b (August 7, 2020):**

- Fixed a small bug caused by our fix to the last bullet point below for Release 4.37. The bug could cause two users sharing a database, both of whom had Release 4.37, to not see any changes each other made to the email Subject lines or Body when emailing receipts.

#### **Release 4.37 (August 6, 2020):**

- When you are [emailing](#) receipts or letters, you can now optionally add an additional attachment (in addition to the PDF receipt or letter) to those emails. That is done with a new Optional Attachment option on the window for specifying the email.
- The **Letters** ⇒ **Email Everyone** and **Letters** ⇒ **Email Newsletters** menu options have been merged into one **Letters** ⇒ **Email Donors** [menu option](#), that handles either requirement: emailing donors with or without an attachment.
- Added a new Help topic [HTML in Emails to Donors](#) which has some simple instructions for doing that in the Body of the emails you send when emailing receipts or mail-merge letters, or using **Letters** ⇒ **Email Donors**.
- Fixed two small bugs: When you drill down into a summary field in a report (such as in **Reports** ⇒ **Donor** ⇒ **Donation Info** ⇒ **Sort by Name**) to see the details making up that summary amount, then you use the details report's **Back** button to come back, the paging controls (the icon buttons for First Page, Previous Page, Next Page, and Last Page) were not necessarily re-enabled or disabled properly based on whether or not the main report you returned to had multiple pages. Now they are. Similarly, if you create or change a [Filter](#) in a way that changes the report from one page to many, or vice-versa, those paging controls are now appropriately enabled or disabled. (The controls are disabled when there's only one page.)
- Made it clearer when those report paging controls are enabled by adding a solid black border around them in that case. When they are disabled (when the report is only one page) their border is grey.
- Fixed a bug in the **Letters** ⇒ **Mass Mailing** [window](#): If you checked the checkbox for "I want to just export the data to a file", and picked any of the types in Section 1 of the window other than Individual Donation Information or Total Donations Information, you would get an error message such as "Error at line 320 in wf\_retrieve\_data event of w\_merge\_group. Name not found accessing property receiptable ...", and the program would crash.
- Fixed an obscure bug: if you have "Email receipts, letters and statements only to yourself, for testing" set in the **Maintenance** ⇒ **Receipt Options** [window](#), generate a receipt, then only Email it (to yourself, for testing), it is not supposed to be saved back to the database. However, if during that emailing you changed the Subject or Body of the email to be sent, the receipt did get saved back to the database.

#### **Release 4.36b (July 31, 2020):**

- Fixed a crash in the program introduced by Release 4.36, with text like "Cannot create storage structure to hold mail merge data ...". It occurs in the **Letters** ⇒ **One Letter** [menu option](#) or **Letters** ⇒ **Mass Mailing** [menu option](#), when choosing the type Total Donations Information or Pledge Information and clicking **Merge**.

#### **Release 4.36 (July 30, 2020):**

- Added a new [Groups and Committees](#) feature, that allows you to set up a list of the groups or committees within your organization (with **Maintenance** ⇒ **Groups / Committees**) and then specify which donors are members of each one (in the new Donor Details field Groups / Committees). You can hide that new field, if you are not interested in it, with a checkbox on the Donor Details tab of the **Maintenance** ⇒ **Main Window Options** [window](#).
- Added a Help topic on Importing Donors and Donations from [QuickBooks](#).
- Fixed a weird (and unlikely) problem with [pledges](#). If you had chosen a pledge type other than Simple Annual Pledge, given a donor a more complex pledge, then decided to switch back to the Simple Annual Pledge type, that donor's pledge would end up uneditable.

#### **Release 4.35 (June 26, 2020):**

- Made major internal coding and feature changes to both the **Letters** ⇒ **One Letter** [menu option](#) and the **Letters** ⇒ **Mass Mailing** [menu option](#):
  - Changed the order of the sections in the Mass Mailing window.
  - For Donor Information Only, Current Donation Information or Individual Donation Information, and Total Donations Information type merges, added a Receiptable merge field, that indicates whether the donor and/or the donation is receiptable. (See [Mail Merge Fields](#) for full details on what that field means for each type.)
  - For Total Donations Information merges, added a Receiptable field to the fields available to be displayed in the [DetailsTable](#).
  - Added a checkbox for filtering the donations to be included with the donor, which is only enabled for Total Donations Information merges. If you do that and you restrict the donations to be included, that will affect the TotalAmount, EligibleAmount and AdvantageAmount totals fields, as well as the contents of the DetailsTable and SummaryTable. Uses of this might be to restrict the donations to only one donation category, or to only receiptable, or only non-receiptable, donations.
- In the [Mail Merge Editor](#), when you are editing original templates (rather than completed merged documents), the fields in the "Insert Field" drop-down list are now just the names of the fields themselves, rather than being surrounded with "«" and "»" (the way they get inserted into the template). This makes them easier to read, and also means that if you are in that list and press the first letter of a field name repeatedly, it will cycle through the fields that start with that letter.
- In the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#), imported Phone values like 1234567 will now be reformatted and saved as 123-4567, and values like 1234567890 will be saved as (123) 456-7890. Also, matching on email addresses is now case-insensitive (upper or lower case don't matter).
- In the **Database** ⇒ **Import** ⇒ **Donations** [menu option](#), if negative values are found in the Total Amount field, you are now given a choice of just ignoring input file lines like that, instead of that being an error that causes the import fail. Also, matching on email addresses is now case-insensitive (upper or lower case don't matter).
- Broke up the new Help page on [Importing Donors and Donations from One File](#) into three. The main page contains the general information. A new page contains the information about

[Importing Donors and Donations from CanadaHelps](#) that was previously in the main page.

And there's a page of new information on [Importing Donors and Donations from PayPal](#).

- Changed the **Database** ⇒ **Change Date of Donations** [menu option](#) to allow the From date to be in a different working year from the current one.

#### **Release 4.34b (May 29, 2020):**

- Added some tests to the **Tools** ⇒ **Network Client Information** [menu option](#) (which is only in the Local Network Server Version). The tests check for some of the things that would prevent the Local Network Client Version installation from working. If any of them are detected, you will be given a message and told to contact us.

#### **Release 4.34 (May 28, 2020):**

- Significantly redesigned the [Check for Updates](#) window, including now displaying the changes since your last update on the window itself. The program also now always prompts you to check for updates once a month, to encourage you to get the latest features and bug fixes. (Previously you could opt out of those once a month checks, with an option on that window.)
- Several improvements to the **Database** ⇒ **Import** ⇒ **Donors** [window](#):
  - Added "Skip Column(s)" to the list of Donor Fields on the left (though it isn't really a donor field!). Picking it prompts for a number of columns in the input file to skip, adds "Skip N Columns" (with "N" replaced by your entered number) to the Fields to Import list on the right, and leaves it there on the left.
  - Added an option of using an Email Address field as a unique identifier for matching input file rows to existing donors, in addition to the existing option of using the Member/Envelope Number for that purpose.
  - Added an option to ignore lines in the input file matching an existing donor. (The matching is based on your selected Unique ID field.)
  - Added an option to ignore lines in the input file matching a previous line in the input file. (The matching is based on your selected Unique ID field.)
  - Added the ability to drag and drop rows in the Fields to Import list up and down, to re-order the list, in addition to the existing **Move Up** and **Move Down** buttons for that purpose.
  - Fixed a bug: The feature that prompted to allow you to continue if there were more columns in the input file than specified in your Fields to Import only worked if you specified that there were 0 header rows. If there were 1 or more header rows specified, you would just receive an error message about this and not be able to proceed.
  - Entirely blank lines in the input file are now ignored, rather than causing an error that would stop the import.
- Several improvements to the **Database** ⇒ **Import** ⇒ **Donations** [window](#):
  - Allowed the columns to be imported in whatever order you want, by using an interface like in **Database** ⇒ **Import** ⇒ **Donors**, with a list of Donation Fields at the left, and a list of Fields to Import at the right. You can move columns between the lists, and move columns up and down in the Fields to Import list.
  - Allowed there to be no Cheque # / Paid By field in the import file.
  - Added the Advantage Description field as an importable field.
  - Added "Skip Column(s)" to the list of Donation Fields on the left (though it isn't really a donation field!). Picking it prompts for a number of columns in the input file to skip, adds "Skip N Columns" (with "N" replaced by your entered number) to the Fields to Import list on the right, and leaves it there on the left.



- Added an option of using an Email Address field as a unique identifier for matching input file rows to the donors for whom the donation is to be recorded, in addition to the existing option of using the Member/Envelope Number for that purpose. Exactly one of those two fields must be included in the Fields to Import.
- You are now prompted to allow continuing with the import if there are more columns in the input file than specified in your Fields to Import list.
- Entirely blank lines in the input file are now ignored, rather than causing an error that would stop the import.
- Added an option **Import "Pre-Receipted" into the Cheque # / Paid By Field**, for cases when what you are importing is donations that have already received tax receipts from another charity. (This would apply to imports from [CanadaHelps.org](http://CanadaHelps.org), for instance, which is a charity and issues its own receipts.)
- If there are new Category field values found, you will be prompted with an option to associate them with existing categories (in case they are just different names for the same category). In that window that comes up, you can also specify how to shorten new Category values longer than 20 characters (the maximum length for them in DONATION). The window also comes up if previously-used associations of longer categories to existing categories are being used.
- Added a new **Database ⇒ Merge Duplicate Donation Categories** [menu option](#) and window, for changing all donations with one category into another category, and then deleting that first category.
- Added a Help topic on [Importing Donors and Donations from One File](#). These instructions can be used if you need to import files containing both donor and donation information on the same line. This would often be because they were exported from online donation processing services, such as [CanadaHelps.org](http://CanadaHelps.org).
- In the **Database ⇒ Merge Duplicate Donors** [window](#), changed the sort on the displayed donors to be case-insensitive, to match the order in the main window's Donor List. (Previously a donor with a last name starting with a lower-case letter would sort to the bottom of the list on this window.)
- Made a fix that should prevent problems that a few users were having, who were using the built-in rather than mail-merge receipts. It occurred when they used certain **Receipt** menu options. If they were somehow able to quickly close the main window after the print (for **Current Donor Original Quick Print**) or after closing the window displaying the receipt for other options, the program could crash with a message about "Null object reference at line ... in ue\_...\_receipt of object w\_donation". Fortunately even when that happened the receipt was both printed (for **Current Donor Original Quick Print**) and saved OK!
- Fixed an unintentional limitation to [deleting donors](#). The rule is that you cannot delete a donor who has donations in the current year. However, if you chose an option on the [Donations](#) tab of **Maintenance ⇒ Main Window Options** to display further years of donations on the main window, and the selected donor had displayed donations in other years (but none in the current year) you were still prevented from deleting it. Now that is allowed, as it should be, with a message explaining that this does not affect the donor in other years.
- For Canadian users, if you enter or edit what the Canada Revenue Agency calls a donation with [advantage](#) (one where you enter both a Total Amount and an Eligible Amount), and the donation is receiptable, and the advantage (the difference between those two amounts) is more than 80% of the Total Amount, you will now receive a warning saying that the donation should probably be marked [non-receiptable](#). You will not receive warnings about previously entered donations where this is an issue, unless you edit them.

- For Canadian users, if you enter a Gift in Kind that has a value of at least \$1,000, and have not entered appraiser information (which may be required by the Canada Revenue Agency), you will now be prompted to do that.
- For users in countries other than Canada or the U.S.A. who checked **Use A4 Paper** in the **Maintenance** ⇒ **Receipt Options** [window](#), fixed seven built-in reports, plus [Custom Reports](#) in some cases (if they were printed in Portrait mode). They were cutting off a tiny bit at the right edge, and/or printing extra blank (or almost blank) pages after each page.

#### **Release 4.33b (April 28, 2020):**

- Made a technical change that should prevent a problem that a few users were having where they were shown a log file saying that the Chilkat function UnlockBundle needed to be called.

#### **Release 4.33 (April 24, 2020):**

- Made some improvements to both the messaging in the program, and the relevant Help topic about [Gmail problems](#), when you are [configuring email sending](#) for a Gmail account and it doesn't work at first. Also improved the Help and the program's messaging about email configuration problems for several other email services, which either need or might need you to set up a special "application password" for use only with this program.
- Added a capability to the «if:FIELDNAME» [mail-merge field](#), which included the following text (up to an «else» or «endif») only if the value of that named field was non-empty, or for amount-type fields, not \$0.00. You can now also specify it as «if:FIELDNAME=VALUE», which will include the text only if the value of the field is exactly the same as the value you enter after the equals sign. (For amount-type fields, that value has to be shown in your standard currency display format, such as \$100.00.)
- Fixed a possible problem when you are displaying multiple years of donations on the main window (as set by an option on the [Donations](#) tab of **Maintenance** ⇒ **Main Window Options**). If the current donor had donations in other years for which the donation categories were not present in the current year (for instance, because you deleted them), they would show up as just a number, not their description. Now the description will always show up properly in such cases.
- Fixed a bug for users logging in with the [Limited User Password](#), running the **Reports** ⇒ **One Date Donation** [report](#): if the Donation Details checkbox was unchecked, checking it would cause a techie error message and the program would crash.

#### **Release 4.32c (April 16, 2020):**

- Prevent a techie error message, that starts with "Getting lastmodified date and time for file ... failed" in mail-merge activities, including using either the **Edit** or **Merge** buttons in **Letters** ⇒ **One Letter** or **Letters** ⇒ **Mass Mailing**, if a file is not in an expected directory. (Fortunately that message was harmless and the process continued successfully in any case.)

#### **Release 4.32b (April 10, 2020):**

- Fixed a bug in the new [Batch Entry](#) features that allow for multiple batches on the same day. If you had already saved one batch with a description, then went back to update further on that same date, but left the In Batch drop-down showing the default of "All", then if you entered any new donations in the main batch entry window that comes up, it would fail on a Save, with an error about "violation of FOREIGN KEY constraint".



- Changed the default for the In Batch drop-down in the Batch Entry options window for a given date that already has had batches saved for it to be the last batch saved, rather than "All". Made the same change to the default Batch shown in the [options](#) window for **Reports** ⇒ **One Date Donation**, to also show the last batch saved. Explained all of this better in the Help topics for Batch Entry and for those reports.

#### **Release 4.32 (April 9, 2020):**

- Renamed two of the versions of DONATION to better describe them: the Standalone version is now called Standard, and the Web Network version is now called Remote Database. This does not affect their features in any way, just their names!
- Fixed a bug in the new [Batch Entry](#) features that allow for multiple batches on the same day, each with its own Description. Somehow if you created more than one named batch, it was erroneously merging the 2nd and further ones on a day into the first one, ignoring the fact that you had given them new Descriptions. The 2nd and further Descriptions were not saved at all.
- Fixed a problem that was causing every new release to reload the original mail-merge templates provided with the program, whether or not they had been updated. (That reload would not affect any of your edited templates.) However, the fix will actually only take effect starting on the next release after you install this one (or after the next one you install).
- Fixed a problem that could cause incorrect error messages when installing the Local Network Client version, where the installation program could give an incorrect message about needing to upgrade the Local Network Server version first, when it had already been upgraded.
- Organization Names with leading or trailing spaces in the name can cause problems with license keys not matching properly, so we made a couple of small changes to prevent and/or fix that.
- Added a message to the installation programs, to give an error message and ask for confirmation if you were trying to install an older version on top of a newer version. However, that will only take effect if the older version being installed on top of the newer one is this version or later.

#### **Release 4.31c (March 14, 2020):**

- Removed restrictions about memorizing [One Date Donation](#) reports, and replaying existing [memorized](#) ones, imposed by release 4.31b:
  - They can be memorized and replayed again.
  - Ones memorized in releases prior to 4.31 can be replayed again.
  - When you replay memorized ones, the options window will show up with the correct options selected, and with all of the checkbox options greyed out so that they cannot be changed. That ensures that you are replaying the report with the same options that you originally memorized.
  - The one thing that could not be fixed is that ones memorized using exactly release 4.31 will likely not work properly, because they did not correctly memorize the desired options in the new options window. They will always try to replay the simplest Details-only report with no additional columns.

#### **Release 4.31b (March 10, 2020):**

- Fixed bugs about the One Date Donation reports:

- One bug prevented them from working from the [Reports Browser](#), after the changes made in release 4.31. They did work from the main **Reports** ⇒ **One Date Donation** menu option.
- Another bug was that previously memorized One Date Donation reports would have crashed the program. Now you get a message saying that that memorized report can no longer be used, and you should recreate it or just run your desired One Date Donation report directly.
- The final problem is that if you memorized new One Date Donation reports, they would not necessarily display the same report when you tried to replay them, and any Sort or Filter saved with them might not work, because the options in the new [options window](#) for those reports are not saved. So those reports can no longer be memorized. (That restriction was eliminated in the next release, but this was the only quick fix available to eliminate this potential problem.)
- Removed an apparently incorrect restriction (added in release 4.24b) stopping the Local Network Server version from backing up to mapped network drives. The Local Network Client version still cannot write to mapped drives on the server (which is making the backups), for technical reasons. Also, trying to do that now gives a nice error message explaining that that doesn't work, rather than a techie error window.
- Prevented a way where you could end up with a database that thinks it is working on year number 0 (rather than the current calendar year) when you first set up a new database.
- That previous fix also prevented a very obscure and unusual problem where on a startup to the program, you get a message "Cannot update CONSTANTS table with your working year number". In addition, if this problem had already happened, there is a fix in this version that handles it.

#### **Release 4.31 (February 25, 2020):**

- Eliminated all of the sub-menu options under **Reports** ⇒ **One Date Donation**. Clicking that menu option now brings up a [window](#) that allows you to pick various options, to indicate which sections of the report you want included, and which additional columns you want included.
- Added two new versions of reports under **Reports** ⇒ **One Date Donation**, that were not previously available. They are ones with both a Details section and a Summary section, that show the donation Description column.
- Changed the Email field in the Donor Details area of the main window to allow multiple semicolon-separated emails to be included in that field. The same change was made in the Email field in the window for sending emails to arbitrary people (used for [emailing backups](#), for emailing reports saved with the **Save As** [button](#), and a few other places). For instance, "john@gmail.com;mary@hotmail.com", without the quotes, would now be a valid entry. When entries like that are used, any emails sent to the the people listed in that field will go as one email, with the To line for the email including both email addresses. That includes when you are [emailing receipts or letters](#) to donors, and when you right-click on a Donor's email field on the main window and pick **Send Email** from the pop-up menu.
- Updated the Help topic [Move the Program from One Computer to Another](#) to include a much shorter simplified instructions section to cover the simplest cases.
- Added some messages to help catch weird situations that have happened to a few users, where their database was messed up in a way that making a backup then immediately restoring that backup would fix. (Please do not try that yourself unless we advise you to do so.)

#### **Release 4.30 (February 18, 2020):**

- Added the capability to give names to batches entered with [Batch Entry](#). That will be of particular interest to churches who have multiple services on one day and want to be able to report on them separately. That affects the Batch Entry windows, and also the [One Date Donation](#) reports which now allow you to select a batch on a given date. A Batch field was also added to the Donation fields column in [Custom Reports](#). If you don't want to use this feature, you can turn it off by unchecking "Use Batch Descriptions" in the Donations tab of the **Maintenance ⇒ Main Window Options** [window](#).
- In the built-in receipts, and template mail-merge receipts, the heading "Summary by Category" above that summary table at the end of the receipt now has the donor's name added, so it will read for instance "Summary by Category for John Smith".  
If you are using mail-merge receipts and have edited that template, you would have to make that change yourself by editing the template accordingly, for instance by adding "for «Name»", without the quotes, after where it says "Summary by Category".
- For the built-in Canadian receipts for with [Advantage](#) (including ones for Quebec), we have removed the Summary by Category section at the bottom of the section for the donor to keep. There was no benefit to that, because such receipts are always for only one donation, and the Details Table that is still included in those receipts has the same details. (Our mail-merge templates for such receipts did not include the Summary by Category table.)
- Changed the **Database ⇒ Copy Addresses** [menu option](#) to also copy email addresses as well as the 4 fields for the postal address.
- If you have the [Local Network Version](#) of DONATION, and you have multiple databases, and an Organization Short Name in the **Database ⇒ Switch Databases** window on the Local Network Server version contains a non-ASCII character (such as an accented character), the Local Network Client version was previously unable to use that same menu option to switch databases. Making any small change then re-saving the entries in the Local Network Server version may now fix this. If not, the message that the Local Network Client version now gives when you try that is much more informative and tells you what the problem is and how to fix it.
- Fixed a bug in the **Database ⇒ Copy Missing Donors** [menu option](#): it wasn't copying the Middle Initial field.
- The **Help ⇒ Email Software4Nonprofits.com** menu option now gives a choice between using your default Windows email program to send the email (which is what it always did prior to this) or using a plain-text form within the program to do so.
- Fixed a bug in the **Database ⇒ Import ⇒ Donations** [window](#), where if a donor was not found with a given Member/Envelope # from the first column of the import file (which cancels the import), the error message said the error was on line 0 of the input file, rather than stating the correct line number.
- Improved some messaging around the automatic retrieval versus manual requesting of license keys. Also changed the Evaluation and Licensing window to normally automatically close after a successful request of a license key or of an evaluation extension.
- Each page of this Help now has a footer that tells when it was last updated. However, for technical reasons, all pages will initially show as December 10, 2019 if they have not been updated after that.

#### **Release 4.29 (January 30, 2020):**

- Fixed a bug: if you are using [mail-merge receipts](#), using **Receipt ⇒ Current Donor Sample** will fail to display the "Sample Only" watermark on, which is needed to make it clear it is a sample and should not be sent to the donor.

- When you are displaying a report and click **Print**, the printer dialog box gives you an option to select only a range of pages to print. If you do that, and when that is done, click **Save PDF**, previously it would automatically only save the same range of pages to your PDF file. Now it will ask you whether you want to save the same range, or all pages.
- Made a change to the installation program that should fix the very infrequent errors where the program cannot properly access 3rd-party controls installed with it, leading to error messages such as "Cannot connect to global object in ChilkatAx-9.5.0-win32.dll ...".

#### **Release 4.28c (January 28, 2020):**

- Clarified the wording of the windows prompting for the receipt issued date when you run the **Reports ⇒ Receipt ⇒ Mailing Labels [report](#)** or the **Reports ⇒ Receipt ⇒ Envelopes [report](#)**. Also, in both of those windows, the displayed date will now default to the latest issued date of receipts for the current working year, and they will verify that any other date you enter is a date on which receipts were issued, in the current working year.
- Prevented a possible but infrequent crash of the program when using the **Receipt ⇒ Current Donor Original Quick Print [menu option](#)** with mail-merge receipts, with a message like "Error at line 10 in mf\_adjust\_menus event of m\_web\_browser ...", appearing after the receipt has printed.

#### **Release 4.28b (January 24, 2020):**

- Fixed a problem introduced by version 4.28 where after the installation, when you first ran DONATION, you could get errors like "Cannot open loaded HTML file ... for writing. Access is denied."

#### **Release 4.28 (January 24, 2020):**

- Resolved problems with mail-merge templates into which images were pasted directly with Cut or Copy and then Paste, rather than being inserted with the **Insert** menu option in the [editor](#). Such pasted-in images could cause the program to crash. Any such images will now be replaced with "IMAGE REPLACED", and you will be given a message explaining that and what to do about it.
- Changed **Reports ⇒ Donation ⇒ Summary by Dollar Ranges** to bring up an extra [prompting window](#) that allows you to change the dollar ranges it reports on.
- Added some additional warnings in a number of help topics about the fact that exporting reports to formatted Excel (with the **Save As** button) can be imperfect.
- Made it clear in the text of the **Letters ⇒ Mass Mailing [window](#)**, and in the Help for that window, that the checkbox that allows filtering the data before merging or exporting also allows sorting it.
- Made it clear in the Help on the **Receipt ⇒ Filtered Donors [window](#)** that matches on the Other Info fields are case-insensitive (upper or lower case doesn't matter) and that they search within the field contents (they don't have to match the entire field).
- Fixed a completely harmless problem in the full installation programs (for versions other than Lite) where if you repeatedly ran the same installer, each time you ran DONATION after the install it might tell you it was loading new or updated original letters files. (Reloading them was harmless, and would not overwrite any versions of those letters that you had edited.)
- Made a change in the full installation programs so that a reinstall will fix things, if you get a message "Error at line 50" and then the program crashes when you click the **Select Logo and Signature** button (or messages about licensing at some points after that) in

**Maintenance** ⇒ **Receipt Options**. (We think that problem can happen after certain major Windows Updates.)

**Release 4.27 (January 17, 2020):**

- Made some changes in many original mail-merge receipt templates delivered with the program (specifically, ones for Canada - English, French or Bilingual), that will mean that the box border around the Eligible Amount merge field still looks right if you change the font size of that field.
- For the full installers other than for the Lite version, added in the installation of a file needed for conversion of databases from newer versions of [Membership Plus](#), in case it is needed. Previously, if you needed to do such a conversion, DONATION would prompt you to download and install that file, which could be error prone.
- Revised the Help topics on [Exporting Data from the Program](#), [Generating Mailing Labels or Envelopes using Microsoft Word](#), and [Doing Mail Merges using Save As from Reports](#).
- Improved the wording of the email sent with [Email Backups](#) about how to restore the backup.

**Release 4.26e (January 6, 2020):**

- Fixed a bug when copying data to a new year with the **Maintenance** ⇒ **Change Year** [menu option](#): If you were entering Middle Initials in their own field (using the new capability to do that, first available in release 4.18), they were not copied from the previous year's donor details to the new year's donor details. If you already did that copy to the new year, and you **had** been entering Middle Initials in their own field already, there are two ways that you can fix that:
  - a. If you had not yet made any changes to donor or category information in the new year, and had not yet entered any donations in the new year, just delete that new year with the **Database** ⇒ **Delete Latest Year** [menu option](#). Then upgrade to this release, if you have not already done so, and redo the creating of the new year in **Maintenance** ⇒ **Change Year**.
  - b. If that option will not work for you, and it is the year 2020 that didn't get Middle Initials copied into it, please contact us for a SQL Updating Password and SQL statement and instructions for fixing the problem, by copying Middle Initials from 2019 to 2020.
- Fixed a problem that a few users had encountered where they could see an error about "Error retrieving a donor's latest donations" in the [Batch Entry](#) window, which could lead to new donations entered there not being saved.

**Release 4.26d (January 3, 2020):**

- Made more changes to new signature editing possible from the [window](#) reached by clicking **Select Logo and Signature** on the **Maintenance** ⇒ **Receipt Options** [window](#), to correct some positioning calculations if you scroll the image. It also now allows for snipping images 15 or 20 times the minimum desired size (previously only up to 10 times was available). Also improved some of the Help for the signature image, particularly the paragraph specifying how to scan a signature image.
- The following changes were actually parts of Release 4.17 and 4.19, but we failed to note them in the Help until now. The **Database** ⇒ **Import** ⇒ **All Data** [menu option](#) now expects two additional fields in the file for importing donations, the Title and Middle Initial, coming after the First Name field. And it expects one additional final field in the file for importing donations - the Description. (Those points were also not mentioned in the Help topic for that menu option until now.)



**Release 4.26c (December 28, 2019):**

- Made a small improvement to the new signature editing possible from the window reached by clicking **Select Logo and Signature** on the **Maintenance ⇒ Receipt Options** [window](#), to better handle things if your initial signature image to be edited is actually already quite small.

**Release 4.26b (December 28, 2019):**

- Fixed a problem introduced by release 4.26 where the program could crash when you clicked **Select Logo and Signature** on the **Maintenance ⇒ Receipt Options** [window](#).

**Release 4.26 (December 27, 2019):**

- Added new features in the window for selecting [Logo and Signature Images](#), for automatically fitting logos into an appropriate image size, and snipping signatures out of a scan you have made, at an appropriate image size. In almost all cases, this should eliminate the need to use graphics editing programs for those purposes.
- Fixed a bug in many original mail-merge receipt templates delivered with the program, that could push the signature image and name, and any text under them, too far to the right so they get cut off a bit when printed or saved to PDF. Also when existing edited templates are loaded for editing or running a merge to create a receipt, if they have the same problem, it will likely be fixed automatically.
- When running reports (other than to print actual envelopes), your paper size will now always be set to Letter, unless A4 paper size was set in the **Maintenance ⇒ Receipt Options** [window](#), in which case it will be A4. This will override any default paper size set for your printer in Windows.
- For users in countries other than Canada or the U.S.A. who have selected A4 Paper in the **Maintenance ⇒ Receipt Options** [window](#), fixed a bug that caused printing of Envelopes (as with **Reports ⇒ Donor ⇒ Envelopes**) to print on A4 paper instead of #10 envelopes.
- Added the function "IF" to the function selection box for [complex sort expressions](#), and added an explanation of to that Help topic.
- Fixed a bug: For users in countries other than Canada or the U.S.A., the text in a built-in receipt that said things like "Official receipt for the year 2019" could have half of the last character ("9" in this case) cut off when you saved it to PDF, including if you emailed it.
- Did a complete spelling and grammar check of this Help file, and made lots of small corrections.

**Release 4.25b (December 5, 2019):**

- Added a checkbox in the **Database ⇒ Merge Duplicate Donors** [window](#), to allow you to only do the merging in the current working year, rather than the usual default of doing it in all years in which those donors appear in your database.
- Fixed a further unlikely but possible way (beyond what was fixed for Release 4.24d) where users in Canada or the U.S.A. could incorrectly have their printing (and saving to PDF) using the A4 paper size instead of Letter. (A4 is a size used in many countries other than Canada and the U.S.A.) If you are in a country with that A4 paper size, you can set it yourself as an option in the **Maintenance ⇒ Receipt Options** [window](#).
- Improved the message you get on startup, if the program thinks your screen resolution may not be sufficient to show the program's main window and other windows.

- Fixed a bug in an internal function in the program that determined whether you were running the Local Network Client version, that could think that was the case if you were running the Remote Database Version. The only place we are aware this affected is when you used the **Tools** ⇒ **Check for Updates** [menu option](#) in the Web Network Version - it would ask you an inappropriate question about whether you had first updated the Local Network Server version.
- Made some changes to the logic about when revised mail-merge letter and receipt files are loaded into the database, where they are actually stored for use.

#### **Release 4.25 (November 28, 2019):**

- Added a "Hide SQL Text on Next Window" checkbox to the [Custom Reports](#) window, which causes the next window that comes up to hide the generated SQL rather than displaying it as usual.
- Added a new section to the end of the Help topic [Generating Receipts using Mail Merge](#), titled "Generating Receipts with Multiple Mail-Merge Template Files".
- Fixed a bug that a few users were encountering where they were trying to use a mail-merge letter or receipt, and they got a message such as "The original HTML file ... has not yet been stored in database." Now as long as that file actually exists, it should be stored in the database for you in that situation, and the program will be able to use it.
- Fixed a bug in the [Mail Merge Editor](#), where the **Insert** ⇒ **Page Break** sub-menu options would either appear to not work at all, or might make all or part of the existing document disappear.
- Fixed another bug in the [Mail Merge Editor](#), where sometimes if you edited with an external editor (such as the option to do so with Notepad), when you returned to the editor and it prompted you to reload the changed document, there could be odd messageboxes or error messages after you answered Yes to that.
- Changed all original mail-merge letter and receipts files in a way that clicking **Ctrl+Home** in the editor would get you to the outside of the table at the top of the document, rather than inside it. That way you could press Enter, and then add something above that table. Previously the only way to get something at the top was with the **Insert** ⇒ **Page Break** ⇒ **At Start of Document** menu option, which might not be what you wanted (a page break), or by using an external editor. These updated original versions will only be installed by full installation programs downloaded from the [DOWNLOAD](#) web page, not if you use **Tools** ⇒ **Check for Updates** in the program.

#### **Release 4.24d (November 25, 2019):**

- Corrected an error when new databases are being initialized (either for a first install, or if you are creating them for [Switching Databases](#)) where the program incorrectly decided to default your paper size for reports to A4 instead of Letter. (A4 is a size used in many countries other than Canada and the U.S.A.) If you are in a country with that A4 paper size, you can set it yourself as an option in the **Maintenance** ⇒ **Receipt Options** [window](#).
- Corrected the fact that the version 4.24c installation programs, excluding the full Standalone installer, were accidentally not "code signed". As a result, when you downloaded them, your browser and/or anti-virus software might be more suspicious of them, saying they are from an "unknown vendor". or words to that effect. (They were still OK though!)
- This version was created with a new version of the script used by our installation program builder. (This is primarily a note to ourselves. The new version is "daAll.suf".)

#### **Release 4.24c (November 21, 2019):**



- Corrected an error if you downloaded a Web Network Version database to become a local database, with the **Upload/Download** ⇒ **Download Web Database to Local** menu option, as part of converting back to a local version such as Standalone. This version fixes that, even if the download has already been done and you have switched to Standalone. (Technical details for our internal memory: It had failed to grant appropriate permissions to a newish database stored procedure named sp\_generate\_name, and to a new database table MEMORIZED\_DONATIONS, which could lead to error messages about those objects, and perhaps crashes of the program, likely harmless.)

#### **Release 4.24b (November 20, 2019):**

- The program has never been able to successfully restore a backup from a mapped network drive. Now it has a clear error message about that, with instructions of what to do about it (copy the file to your local computer then restore it), rather than a more technical one that just says it cannot open the backup file to be restored. Also changed the previous messaging and Help file information for if you were trying to use a UNC path (like \\othercomputer\\c\\...) to also state that you have to copy the file to your local computer in order to restore it.
- Updated a number of Help pages, including [Multiple User Options](#), to reflect the fact that we are discontinuing the one simultaneous user Web Network Version option. (The five simultaneous user Web Network Version will still be available.) We are doing this because we believe that when you only need one user at a time accessing a shared database, the Standalone version with the [Cloud Storage Service](#) is a much better option than the Web Network Version, because it is **much** faster, and potentially cheaper.
- Made a minor revision to the **Database** ⇒ **Validate** [menu option](#) so that for the Web Network Version, there is not a significant delay caused by reloading the main window when the validation is finished. A similar coding change was made to the **Backup/Restore** ⇒ **Backup Database** [menu option](#), which will not be obvious to users because that menu option is not needed (or available) in the Web Network Version.

#### **Release 4.24 (November 12, 2019):**

- Added a new feature allowing you to memorize [recurring donations](#), for automatic insertion on a weekly or monthly schedule.
- The **Database** ⇒ **Copy Missing Donors** [menu option](#) now has another option, to just copy the currently selected donor in the current year to one or more other years, if it is missing in those years. Previously the only option was to copy all missing donors.
- The **Maintenance** ⇒ **Receipt Options** [window](#) now has an option, that applies to all emailing of receipts, letters or emails to donors, "Bcc: to yourself". If you check that, all emails sent to donors will have a Bcc (blind copy) to your email address that the emails are sent from, so you can have a copy of each email.
- Prompts for dates or date ranges for reports now have different messages if you enter a date outside of the current working year (or fiscal year, where appropriate). The new messages tell you to use **Maintenance** ⇒ **Change Year** to see reports for a different year.
- Made a change to the [mail merge editor](#) (which is behind the scenes an Internet Explorer web browser window) that *may* allow more modern HTML to work in documents, if you edit them manually (for instance with the Edit in Notepad option in the editor).
- Fixed a bug in **Database** ⇒ **Import** ⇒ **Donors**: problems with the lengths of fields, that could be truncated (shortened) to fit into the program's allowable field lengths, were being treated

as errors preventing the import, rather than just information. Now those types of errors can still allow an import to be done.

- Fixed a few things that users starting the program with the [Limited User Password](#) had been allowed to do, but should not have been allowed to do: Use the **Correct** button for donations, and edit the Advantage Description column for existing donations, if it was being displayed.
- Fixed the fact that the **Help** button in the [Calculator](#) window didn't go the right help page.
- Did a significant re-write of some common program code shared between our two programs DONATION and ACCOUNTS, leading to related changes in the code that is unique to each program. This is not intended to change any program behaviour. (This note is primarily for our own memory of when this was done, since this should not affect users of the software. The technical change was to stop injecting global variables into program objects.)

#### **Release 4.23 (October 16, 2019):**

- The [Cloud Storage Service](#) now requires an email address for notifications to be set on each computer running DONATION, which should be the email address of the main user DONATION on that computer. You will be prompted for it when you first use this (or a later) version, if it has not yet been set up, and it can also be set or changed in the **Backup/Restore** ⇒ **Backup Frequency and Options** [window](#).
- Release 4.22 used a significantly re-written installation program. Various problems were found with it since then, and new versions of the installers were uploaded between these releases. This release includes fixes for all known problems so far.

#### **Release 4.22 (October 7, 2019):**

- Added **Reports** ⇒ **Fiscal Year** ⇒ **Non-Receiptable and Pre-Receipted Donations** and **Reports** ⇒ **Fiscal Year** ⇒ **Unreceipted Donations**, which are just like **Reports** ⇒ **Donation** ⇒ **Non-Receiptable and Pre-Receipted** and **Reports** ⇒ **Donation** ⇒ **Unreceipted**, respectively, but for the current fiscal year.
- Fixed a bug in [Batch Entry](#): for full users who aren't displaying the Member/Envelope # field, or for [Limited](#) users who can't see donor names, the "Count Cash" button that should have been at the bottom left was either invisible, or moved so far left that only the last two characters, "sh", were visible on it.
- Fixed a bug: If Canadian users used the [Report Browser](#) to run the DONATION REPORTS ⇒ Unreceipted report, they did not get the correct version of it that included the Notes column, as they would do if they ran it with the menu option **Reports** ⇒ **Donation** ⇒ **Unreceipted**. (That column isn't needed for non-Canadian users.)
- Simplified the installation of the [Local Network Client](#) version of the program: you no longer have to enter the full pathname to the database file. Also improved error handling on connection errors when running that version. Those improvements include now having the option to prompt for a changed Local Network Server computer name from the program itself, which could previously only be done by re-installing the Local Network Client.

#### **Release 4.21 (September 17, 2019):**

- Added a new control **Show Donations** on the [Donations](#) tab of **Maintenance** ⇒ **Main Window Options**, with the options "Only Current Year", "Also One Prior Year", or "All Years". This determines how many years of donations are shown with each donor on the program's main window. Until now the behaviour has always been the same as the default option, "Only

Current Year". If additional years are shown, they are only for your information: you cannot edit them or delete them there.

- Moved **Reports** ⇒ **Donation** ⇒ **Current Donor** and **Reports** ⇒ **Donation** ⇒ **Current Donor History** to be on a new **Reports** ⇒ **Donation** ⇒ **Current Donor** sub-menu, with the previous **Current Donor** report now named **Current Year Details** on that sub-menu, and the previous **Current Donor History** report now named **History (Annual Totals)**. Added a new 3rd report **All Years Details** to this new sub-menu. It lists all donations for the current donor in all years.
- Added **Reports** ⇒ **Fiscal Year** ⇒ **Receipted Donations**, which lists all receipted donations for a range of dates within your fiscal year.
- For [Custom Reports](#) with retrieval parameters (ranges of dates and optionally a category), or for [SQL Selects](#) where the codes for those retrieval parameters are used, if you are displaying the report in the standard Normal report style (not Grid), there is now an extra line in the report's header, showing the values of the retrieval parameters you entered (for instance, "Donations between Jan 1, 2019 and Dec 31, 2019 for the category General").
- Fixed two bugs in receipts introduced in release 4.18: both Quebec (French only) regular receipts, and Quebec (bilingual) Gift in Kind receipts with Advantage (Eligible Amount entered) would fail, with errors including saying that there was no column named "donor.NAME\_W\_MIDDLE".
- Improved the messaging if you have a [memorized report](#) that you memorized after using the **Save SQL** button to save its SQL to a file, editing that SQL, then [reloading](#) it with the **Load SQL** button, and then when you run the memorized report the saved SQL no longer works. (That would most likely because we have changed the definition of that built-in report in a newer release of the program.) Also improved the error messages if you are just viewing a non-memorized report and use **Save SQL**, edit, and **Load SQL**, and the loaded SQL doesn't work.
- Fixed a problem where the **Load SQL** button failed if there were any double quotes (") in the SQL.
- Made some internal changes to the [Report Browser](#), that could lead to it being more efficient, particularly for users of the Web Network Version.

#### **Release 4.20b (September 4, 2019):**

- Changed the installation program so it will no longer install on Windows XP (which Microsoft stopped regular support for in 2009) or Windows Server 2003 (which Microsoft stopped regular support for in 2010). Because of this lack of support for security fixes, we do not feel it is at all safe to continue using these versions of Windows, and in addition, some time back we started using some functions in the program that do not exist in those versions. The program can be installed on all later versions of Windows: Vista, 7, 8, 8.1, 10 or later, or Windows Server 2008 or later.

#### **Release 4.20 (September 3, 2019):**

- Added the menu option **Receipt** ⇒ **Current Donor Original Quick Print**. It is just like **Current Donor Original**, but it immediately prints the receipt to your default printer and closes the receipt-viewing window, without letting you look at it first. The only messaging is to tell you the receipt number and that it has sent it to your default printer. This is particularly useful for high-pressure situations in which you have to do a lot of data entry of individual donations and create each receipt immediately after making the entry.
- Made two improvements to [Custom Reports](#):

- There is a new **Include All Donors** checkbox above the Donor columns list. If you check that, and you are including both Donor and Donation fields, your resulting report will include any donors that have no associated donations, where previously, or if you do not check that, only donors with donations were included.
- Reports that include either the Envelope # column (which might alternatively be called Member #) or a full Name column (not just individual partial name fields like First Name) will be sorted on that Member/Envelope # if it was selected, or else the donor's reversed name (like "Smith, John"). Previously except in very limited circumstances Custom Reports were not sorted at all initially.
- Changed all of **Reports ⇒ Donation ⇒ Receipted**, **Reports ⇒ Donation ⇒ Non-Receiptable / Pre Receipted**, and **Reports ⇒ Donation ⇒ Unreceipted** to also show the Eligible Amount values if that field is being shown in your Donation Details area (as specified in the Donations tab of the **Maintenance ⇒ Main Window Options** [window](#)).
- When you run a report that has selection criteria (such as a range of dates) and get the message "There is no matching information for this report", you now get an additional message telling you that you can click the **Rerun** button to try again with different criteria.
- Fixed an unintentional recent change to the sort orders in **Reports ⇒ Donor ⇒ Donation Info ⇒ Sort by Member/Envelope #**, **Reports ⇒ Donor ⇒ Addresses by Member/Envelope Number**, and **Reports ⇒ One Date Donation ⇒ Details with Member/Envelope #** (and the variations of that one with an added Summary or Description). Previously in those reports, all donors with Member/Envelope numbers came first in the report, in order by that number, then all of them with no such number, in alphabetical order. That had accidentally been changed to put all of the ones with a number last, instead of first. That is now fixed.
- In a number of reports (and mail-merge tables) that list donation details, added the donation category name to the sort order, after the existing sort orders. So for instance if before this release a report was sorted by Name then Date, and could thus end up randomly sorted within one name and date by Category, now it is sorted by Name, Date and Category.
- Made some fixes for computers with a 2nd monitor attached:
  - For the windows that remember their last-used size and position when you next use them (including the program's main window and reports-viewing window), if you had moved the window to that 2nd monitor, it will again come up there when you next open it.
  - It takes care of the case where you last had such a window on the 2nd monitor, then unplugged that 2nd monitor from your computer and used the window again: it puts the window back onto your main screen.
  - It could still be a problem if you last had such a window on the 2nd monitor, then turned off that monitor and forgot to turn it back on. In that case, the program will still think it can put the window on that 2nd monitor, since Windows cannot detect that the monitor is attached but turned off. So the window will just appear to not come up, and the program may appear to be hanging!

#### **Release 4.19b (September 3, 2019):**

- Put back a missing helper file (msvcp100.dll) which had somehow gone missing from the installation programs for the Lite and Local Network Client versions.

#### **Release 4.19 (August 23, 2019):**

- Fixed the width of the Add Donor window, accessed from the [Batch Entry](#) window, to accommodate the new Title and Middle Initial fields. Also fixed the fact that it wasn't properly

hiding them in that window if you had chosen in [Main Window Options](#) not to have them showing.

- Changed all of **Reports** ⇒ **Donation** ⇒ **Receipted**, **Non-Receiptable/Pre-Receipted**, and **Unreceipted** to show the Eligible Amount column if you have selected to have it displayed in the Donations tab of [Main Window Options](#).
- This release uses a new version of PowerBuilder, the program we use to build DONATION.
- Made some adjustments to converting / importing routines from other vendors' databases, given that we now have separate Title and Middle Initial fields in the donor details:
  - For converting from [Membership Plus](#), the Middle Initial was previously added at the end of the First Name, but will now go into its own field. The Title was previously not being imported, and now is being imported into the Title field.
  - For converting from [GiftWorks](#), the Title was previously being ignored, and is now being imported into the Title field.
  - For converting from [Geminon](#), the Title was optionally being imported at the start of the First Name, but is now being imported into the Title field.
  - For converting from [Church Assistant](#), no changes were made because it did not have fields for Middle Initial or Title.
  - For importing from files exported from [Viansoft](#), no changes were made because it did not have fields for Middle Initial or Title.

#### **Release 4.18b (August 9, 2019 - re-issued August 21 with corrections):**

- Fixed a bug introduced by release 4.18, where if you hide all three of the "Member/Env #", "Title" and "Middle Initial" columns in the **Maintenance** ⇒ **Main Window Options** [window](#), a empty space appears in the main window between the First Name and Last Name fields.
- Fixed a bug introduced by release 4.18, where a database update fails, with an error message like "Column Unknown d1.middle\_initial...", if you are updating from a release that is quite a few years old.

#### **Release 4.18 (July 31, 2019):**

- Added two new Donor Details fields: Middle Initial (abbreviated on the main window as "Mid.Init") and Title. If you don't want to use them, you can turn them off in the **Maintenance** ⇒ **Main Window Options** [window](#)'s "Show Fields" section.
- Moved the First Name field to be above the Last Name field in the Donor Details area on the main window. Previously it was below it. The Title field, if you are showing it, appears on the same line as the First Name, and the Middle Initial field, if you are showing it, appears on the same line as the Last Name. That way if you read those four fields from left to right and top to bottom, they will come out in the normal order, like *Title First Middle Last*. Example:

Title / First Name:	Mr.	Bob
Mid.Init. / Last Name:	C.	McDonald

- Added a checkbox on the **Maintenance** ⇒ **Main Window Options** [window](#) for "Include Title in Names for Letters and Receipts". If that is checked, anything you enter in the new Title field will be automatically included in the donor's name in all [receipts](#), all [mail-merge letters](#), when [Emailing Newsletters or Everyone](#), and also in the two [statement](#)-like reports, **Reports** ⇒ **Donation** ⇒ **Details, One Page per Donor** and **Category Totals, One Page per Donor**.
- Added a checkbox on the **Maintenance** ⇒ **Receipt Options** [window](#) for "Include Middle Initial in Donor Names in Receipts". If that is checked, all receipts showing the donor's name will automatically include any Middle Initials you have entered. That option defaults to



checked for users in Canada, because the Canada Revenue Agency requires donors' middle initials to be included on receipts.

- Added additional [merge fields](#) for mail-merge letters (but not mail-merge receipts) for the Middle Initial and versions of the Name fields including the Middle Initial. (Those additional fields are not included in mail-merge receipts because the checkbox mentioned in the previous point controls whether or not the Middle Initial is automatically included.)
- Added additional Donor fields in [Custom Reports](#) for the Middle Initial and Title, and variations of the Name fields including one or both of them.
- Changed the two [statement](#)-like reports, **Reports ⇒ Donation ⇒ Details, One Page per Donor** and **Category Totals, One Page per Donor**, to show the donor's address as well as their name.
- Added the ability to import the Title and Middle Initial in the **Database ⇒ Import ⇒ Donors** [window](#).
- Did **not** at this point add the ability to import any separate Title or Middle Initial fields from any other programs that DONATION has specific [importing](#) or conversion routines for, such as Membership Plus or GiftWorks. That will be investigated and added, as appropriate, in a later release.
- Added some extra messages in the program if you are using the **Maintenance ⇒ Email Sending Configuration** [menu option](#), for handling new issues we have become aware of for configuring Apple-supplied email addresses ( @me.com or [@icloud.com](#)).
- Changed the installation programs so that they don't try to put the uninstallation program in a C:\Windows\Donation folder, which some users may not have permission to write files to.
- Corrected a few places in the Help where filter conditions were shown using the old-style filter expressions, to instead show the fill-in-the-blanks values used in the new [Simple Filter](#) window introduced in release 4.15.

#### **Release 4.17 (July 10, 2019):**

- Added an **Edit ⇒ Select All** menu option to the mail-merge [editor](#), which selects (highlights) all of the text in the document (same as pressing **Ctrl+A**).
- Put back in the **Backup/Restore ⇒ Restore Old Database (DONATION3.DB)** menu option. Although it was only needed for conversion from version 2.70b or earlier of DONATION (released in 2007 or earlier), and almost no users should still need that, it was still occasionally coming up.
- Fixed several mailing label reports that had accidentally been changed to be sorted in order of first name then last name, instead of last name then first name like they were supposed to be.
- Changed a number of reports that showed a name with the last name first (like "Smith, John") to call that field "reversed\_name" instead of just "name", in the Sort or Filter windows, for clarity. (A field called "name" should be first name first.)
- Fixed a bug where if you were viewing a report that showed the sort order in the header, clicked **Sort**, then clicked **Cancel** or pressed **ESC** on the sort window, the sort order would disappear from the header of the report. Also fixed a couple of other very subtle minor bugs in that window.

#### **Release 4.16 (July 3, 2019):**

- Replaced the somewhat technical Sort window for Reports and [Mass Mailings](#) with a new easier [Sort](#) window, that only shows fields that you are likely to sort on.



- Fixed a bug introduced by release 4.15, where using the **Email/Print** button after running **Reports ⇒ Donation ⇒ Details, One Page per Donor** or **Category Totals, One Page per Donor** would give an error message about the donornum and the program would exit.
- Made some further improvements to field names for filtering and sort orders on reports, as in the changes for release 4.15.
- There is now a video on the new [Simple Filter](#) window on the [Demos and Samples](#) web page.
- Changed the font size of most of the text in this Help file from 10pt to 11pt, to make it easier to read on screen or if you print out topics. (On screen, you can also zoom the help text to read it more easily, by holding down **Ctrl** and scrolling your mouse wheel up, or pressing **Ctrl** with **+**).
- Various small updates and improvements to the automatic configuration available for various email addresses, by using the 2nd option on the first window that comes up for the **Maintenance ⇒ Email Sending Configuration** [menu option](#).

#### **Release 4.15c (June 26, 2019):**

- Fixed a bad bug in full installers downloaded from the website (but not updates done with **Tools ⇒ Check for Updates**) that would cause errors such as "Internal error: Internal donor [or donation] number not updated after save ...".

#### **Release 4.15b (June 24, 2019):**

- Fixed some issues in release 4.15 that could make it more likely for anti-virus programs to object to the installation. (In fact, there was absolutely nothing bad in it. We had just accidentally omitted what is called "code signing" that makes anti-virus programs trust installations more.)

#### **Release 4.15 (June 17, 2019):**

- Replaced the rather technical Filter window for Reports and [Mass Mailings](#) with a new much easier [Simple Filter](#) window.
- Reviewed all of the field names in reports available for filtering. Changed some to be clearer, and removed some that it wouldn't make sense to filter on.
- Improved sorting in most reports to prevent a problem where you add a filter, then remove that filter, and then the report ends up out of sort order.
- Added the **Database ⇒ Copy Addresses** [menu option](#), for copying all addresses from one year to one or more other years. This is for use if they have been updated in the one year's donor records and you need them to be the same in other years.
- In the [Web Network Version](#), the **Database ⇒ Switch Database** [menu option](#) now allows editing, such as creating a new row with a different database extension, which previously it didn't allow. The only obvious purpose for this would be if you had access to two remote databases, and wanted to switch back to a different version like Standalone, and needed to download the remote databases to two different local databases.
- The [Local Network Client](#) version of the program can now make [Internet Backups](#).
- When you are [creating receipts](#) and there are no receiptable donations matching what the menu option you are using is looking for, the messaging has been improved to be clearer. Also fixed one bizarre problem that one user was having where there was a receiptable [Gift in Kind](#) donation but using **Receipt ⇒ Gift in Kind Receipts ⇒ Current Donor Original** said there weren't any, and would not generate the receipt.

- Changed **Reports** ⇒ **Bank Deposit** ⇒ **Summary List** so you can click on a date, and drill-down to the **One Deposit Details** report for that row's bank deposit.
- Changed **Reports** ⇒ **Donation** ⇒ **Summary by Dollar Ranges** to prompt for a range of dates within the year, as well as the optional category it already prompted for, so that you can report on part of each of the current and prior years.
- Fixed **Reports** ⇒ **Administrative** ⇒ **User Login History** which except for the Web Network Version, was never displaying anything in the User column. Now it correctly shows the Windows username of the user who was running it.

#### **Release 4.14g (May 23, 2019):**

- Fixed a crash when starting the program for the first time if you clicked the Register Now button (in versions other than the Web Network Version).

#### **Release 4.14f (April 17, 2019):**

- Fixed a problem that prevented successful Web Network Version registrations from its Log In window, or if you are prompted to register as a first time user, for users that were not previously using another version.
- Fixed some potential problems printing Help topics with screen shots that could be too wide for the page.

#### **Release 4.14e (April 3, 2019):**

- Improved the messaging and options for Web Network Version registrations from the program to help prevent multiple independent registrations for the same organization which could cause duplicate databases. The change also allows for additional registrations for different organizations.

#### **Release 4.14d (March 26, 2019):**

- The program now detects when the current version of the licensing.dll file has not been properly updated by an update, and sends users to the DOWNLOAD page on the website to download and re-install their current version, which fixes the problem.

#### **Release 4.14c (March 25, 2019):**

- A number of users had problems running the program after doing updates to the latest versions, because the file licensing.dll was not being updated. We are unfortunately not sure why that was happening, and this update will not necessarily fix it, but at least it may give a more informative error message if appropriate, and encourage you to send us a screen shot of that message.
- Prevented a possible repeating error message, that you cannot get out of, in a very unusual circumstance when trying to make or restore a backup, if the last-used backup directory was on the C: drive and could be found or recreated for some reason.
- Fixed a problem where non-English characters could not always be successfully saved to and retrieved from the program's settings file DONATION.INI, including if they were part of things like the last-used backup directory.
- Fixed a problem when you run **Reports** ⇒ **One Date Donation** ⇒ **Details**, and it has more than one page. At that point, the VCR-like buttons for First Page, Prev Page, Next Page and

Last Page are enabled. If you used the button at the bottom of the last page to switch to the Summary report, then used the button at the bottom of that to switch back to the Details report, the VCR-like buttons did not get re-enabled like they should have been.

- Fixed a bug in the built-in [receipts](#) for users selecting either Australia option, or New Zealand, or Other, in the **Maintenance** ⇒ **Receipt Options window**, if they also checked the new checkbox for "Use A4 Paper". The bug was that the area for the [logo](#) at the top right of the receipt had a border around it, so either it would show your logo with an extra border, or if you hadn't specified a logo, it would show an unwanted rectangle there.

#### **Release 4.14b (March 15, 2019):**

- When exiting the program to install an update downloaded by the **Tools** ⇒ **Check for Updates menu option**, avoid some of the normal extra prompts that can come up when you exit the program, such as to backup, validate your database, even check for updates itself!

#### **Release 4.14 (March 13, 2019):**

- Fixed a bug when [Importing Donations](#). If you imported a new category, donations with that category would just show a number instead of the name of that category, until you exited and restarted the program. Also, if donations were imported for the current donor, they were not displayed until you switched to another donor then back to the current one.
- Mail-merge letters emailed to donors, which are sent as attachments, now have the filename "letter.pdf" instead of "report.pdf".
- Added some code, when [emailing](#) mail-merge letters, receipts or reports, to catch and prevent a weird case where the previous saved PDF file cannot be deleted or overwritten, leading to a risk of sending the wrong letter or receipt to the wrong person.
- Added to the information that can be displayed to you when trying to [configure](#) emailing with **Maintenance** ⇒ **Email Sending Configuration**, or do emailing, if there are various sorts of problems encountered.
- Added a section on handling [Donations in Multiple Currencies](#) to the Help topic on Entering New Donations.
- Enhanced a number of error messages about bad date entry, to now show what the acceptable Short Date style from the Region settings in Windows Control Panel is (such as MM/DD/YYYY).
- When using the **Database** ⇒ **Copy Missing Donors menu option**, either directly or from a [Custom Report](#), and the copy goes forward multiple years, the program now copies first from the most recent year to the target year, then works backwards. Previously it started copying from the earliest year to the target year, then worked forwards. That change means that you are more likely to get the most up-to-date version of missing donors in the year you are copying to.
- When using the **Maintenance** ⇒ **Email Sending Configuration menu option**, fixed the fact that the "Determine the setting from your default email program" option in the initial configuration window wasn't working if that default email program was a recent version (such as 16) of Outlook.
- Improved the handling and messaging in the situation where you run DONATION and it says that another instance of DONATION is already running.
- Renamed the [mail-merge editor and viewer](#) window's **File** ⇒ **Page Setup** menu option to **File** ⇒ **Page Setup and Margins**, to make it clear that you could set the margins there (which you always could do). Also added a couple of entries about Margins (for mail-merge receipts and letters, and for mailing labels) to the Index of this Help.

- Fixed a bug in **Database** ⇒ **Import** ⇒ **Donations**: importing of CSV files was broken (it tried to treat them as tab-separated files, and gave a message about only having 1 column instead of the desired number).
- Fixed a bug when you click the **Retrieve Donations** button in the **Maintenance** ⇒ **Create Bank Deposit** [window](#), if you left the new Acct # field blank, that could in some cases give you incorrect messages about bank deposits already existing for the same date.
- Fixed a bug when creating a new database in the **Database** ⇒ **Switch Databases** [menu option](#), that could cause the new database to get the same Unique ID for Internet Backups as the one you are switching from.

#### **Release 4.13 (February 13, 2019):**

- For Canadian users, when [generating receipts](#) (either regular, or [Gift in Kind](#)), if there are no receiptable donations of the desired type that have not yet been included in receipts, but there **are** receiptable donations of the other type (out of regular, and Gift in Kind), the messages about that are now clearer, telling you which menu option to use to generate those other ones.
- Corrected **Reports** ⇒ **Donation** ⇒ **By Donor by Category** to include donation totals from donors in the prior year that are not present in the current year's Donor List.
- Changed most of the reports under **Reports** ⇒ **Fiscal Year**, namely **Donor Totals, Sort by Name**, **Donor Totals, Sort by Amount**, **Donor Totals, Sort by Member/Envelope #**, **Donation Details, Sort by Name**, and **Donation Details, Sort by Date**, to all allow you to specify a range of dates within the current fiscal year, as well as an optional category, for the report. Previously all of them always worked for the entire current fiscal year.
- The program now prompts you to validate your database once a month, if you haven't done so in the last month. This is the same action that is done by the **Database** ⇒ **Validate** [menu option](#).
- In the **Reports** ⇒ **Custom Reports** [window](#), the radio buttons for doing the report for a Fiscal Year, which previously always did the report for the entire fiscal year, have been changed to say "For a fiscal year date range" etc., and they now prompt for a range of dates within the current fiscal year when you run the report from the following SQL Select window.
- In the **Database** ⇒ **SQL Select** [window](#), the special codes :FISCAL\_START\_DATE and :FISCAL\_END\_DATE, which used to just force the results to be for the entire current fiscal year, now cause prompting for a range of dates within the current fiscal year.
- Removed the option "Authorize DONATION" for authorizing sending emails from the program from a [Gmail](#) address. We did that because Google recently added a lot of complex criteria to allow software companies to do that, which unfortunately seemed prohibitively complicated for Software4Nonprofits to satisfy. Instead you can use the other option, "Allow less secure applications".
- For users in countries other than Canada or the U.S.A., added an option in the **Maintenance** ⇒ **Receipt Options** [window](#) to specify that you are using A4 paper. If you choose that, both reports and built-in receipts should then fit on A4 paper, including if you save them to PDF. For comments and instructions about making this work for mail-merge receipts and letters, see this [new section](#) of the Receipt Options help page. (Note to users who use Letter size paper: some reports were changed to be a bit narrower, so they would also work on A4 paper, which is only 8 1/4" wide rather than the 8 1/2" width of Letter size paper.)
- Re-wrote the internal processing in the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#) and the **Database** ⇒ **Import** ⇒ **Donations** [menu option](#). Users shouldn't see many differences in the behaviour, except for a few small things:

- A "fix file" is no longer created if fixes are made for problems like too-long field values. Instead, it just displays information about the fixes in a file shown to you in Notepad.
- That file shown to you in Notepad now contains information about both unfixable errors and warnings about things it fixed, clearly separated out into two sections if both types are present.
- It should completely resolve the problem mentioned in the Revision History for Release 4.11d, where you are importing donations from Excel, and it can stop you because the formatting of the Amount column would have caused the numbers to erroneously be imported as \$0. Now such formatting issues should not cause any problems.
- Fixed a couple of related bugs when turning on the [Cloud Storage Service](#): if you had previous Internet backups, and the program prompted you that they appeared to be newer than your current database, and encouraged you to download the latest backup first, it would not necessarily properly do what you asked it to do (either downloading that, or not downloading that).
- Fixed a bug related to settings saved in the database: In the **Tools ⇒ View Saved Settings menu option**, when showing **Current Database settings stored in the Database**, each setting could show twice. (And the underlying problem that caused that could potentially have caused some other subtle problems with settings as well.)
- Fixed a bug when viewing mail-merged receipts or letters: If you did **File ⇒ Print Preview** or **File ⇒ Page Setup**, and then after that did **File ⇒ Save PDF** (or clicked the **Save PDF** toolbar button), it would print to the real printer instead of saving a PDF, and the little "Printing to PDF File ..." window would appear and never go away. (You could close it by clicking on the "X" at the top right!) Now, it just tells you that you cannot do a Save PDF if you already did a Print Preview or Page Setup. Previous versions already prevented you from doing a Save PDF if you did a regular Print first, again because it would fail.

#### **Release 4.12d (January 17, 2019):**

- Fixed a bug introduced in release 4.12 to **Letters ⇒ One Letter** and **Letters ⇒ Mass Mailing**, where sending Donor Information Only, Totals Donations Information or Pledge Information letters could cause the program to crash when you chose to Print the created letter or save it to PDF.

#### **Release 4.12c (January 14, 2019):**

- A few users have been having problems requesting license keys over the Internet. This seems to be due to an internal programming change made (but not noted below) in Release 4.12, that should not have affected anything, but obviously did. Undid that change so it should work for everyone.

#### **Release 4.12b (January 14, 2019):**

- A few users have been having problems requesting license keys over the Internet. This release may not fix that, but it will hopefully give them (and thus us) more informative error messages about the problem.

#### **Release 4.12 (January 9, 2019):**

- Previously, if DONATION was already running, you could not start a [restore](#) of a database backup or [emailed backup](#), by opening or double-clicking such files. Now those actions **do** work if DONATION is already running.
- When you create [bank deposits](#), you can now specify the Account Number for the Bank Account, and it will print on both the report and the deposit slip.
- For multi-user versions (Local Network Version, and Web Network Version with more than one simultaneous user allowed), previously when one user was creating a receipt, no other user could do so, to prevent problems with inconsistent or missing receipt numbers. Now, as soon as that first user has printed the receipt, saved it to PDF, or emailed it, another user can get in to create other receipts. (If the first user does none of those things, other users are still blocked until the first user exits the window where they are viewing the receipt.)
- Fixed a few cases when you have turned off the display of both the Details Table and the Summary Table in the **Maintenance** ⇒ **Receipt Options** [window](#), where it would always print a blank 2nd page. The only remaining problem like this is for the Quebec (Bilingual) receipts, which at this point unfortunately we cannot fix. (For those Quebec users who don't want either table, switching to the [mail-merge](#) version of the receipts, and editing the receipt template to remove those sections, may allow you to have it be just one page with no blank page.)
- If you have displayed the [Report Browser](#) once, then make some changes to memorized reports (in the [Memorized Reports](#) window, or with the **Memorize** button in the [report-viewing](#) window or the [SQL Select](#) window), previously if you then went back to the Report Browser, and looked at the memorized reports there, they would not be changed appropriately based on what you had done. Now that is fixed.
- Fixed a bizarre bug in **Reports** ⇒ **One Date Donation** ⇒ **Details with Member / Envelope # and Summary**: If you added a [Sort](#) to it, or a [Filter](#) (which would only affect the details section, not the summary section), one or both of the summary sections at the bottom might get cut off.

**See Also:** [Revision History 2015 to 2018](#), [Revision History 2011 to 2014](#), [Revision History 2007 to 2010](#), [Revision History - Earlier Versions](#)

## 26.2 Revision History 2015 to 2018

**See Also:** [Revision History - Latest Version](#), [Revision History 2011 to 2014](#), [Revision History 2007 to 2010](#), [Revision History - Earlier Versions](#)

### **Release 4.11d (December 12, 2018):**

- Fixed a bug where Amount values being imported by the **Database** ⇒ **Import** ⇒ **Donations** [menu option](#) can be erroneously imported as \$0, if they were being imported from Excel, in a column formatted as Currency or Accounting. In that case, the program tells the user to instead format that column as Number and try again.
- Fixed a bug where if you clicked on various places in the data of **Reports** ⇒ **One Date Donation** ⇒ **Summary** (and perhaps areas of some other reports that don't show as blue hyperlinks) it would crash after a techie error message.
- Fixed a bug for the [Web Network Version](#): The menu option **Upload/Download** ⇒ **Download Web Database to Local** was failing with an error message. (That menu option was normally only needed if you decided to switch back from the Web Network Version to another version such as Standalone.)



- Fixed a bug for the [Web Network Version](#): If it was an Evaluation version, or your payment had expired, it could prompt you to retrieve a license key from our server, even though that version does not need and cannot use license keys.
- Fixed an obscure and unlikely bug. (This note is mostly for ourselves, as the bug is **very** unlikely to occur to users!) If you are running the Web Network Version and download your remote database to local, then switch to a local version (likely Standalone), then re-restore the backup file that was stored as part of that download process, the program will halt with an error about not being able to execute `sp_validate_connection`. You subsequently cannot open the program, because it keeps getting that same error.
- When a new user with a so-far empty database was trying to start by restoring an Internet Backup from a previous user in their organization, the window that came up to prompt them for the Unique ID for Internet Backups didn't allow typing or directly pasting into the entry field for that value. (You had to use a **Paste ID from Clipboard** button.) Now you can directly type or paste into that field, to avoid confusion.

#### **Release 4.11c (November 5, 2018):**

- [Limited users](#) are now allowed to change their own passwords. For users of the Web Network Version, that is done with the **Maintenance** ⇒ **User Administration** ⇒ **Edit Your Login** menu option. For all other versions (other than the [Lite version](#), which doesn't allow the use of a Limited User Passwords) it is done with the **Maintenance** ⇒ **Change Password** ⇒ **Limited User Password** [menu option](#).
- Fixed a bug introduced in release 4.11b: [restoring](#) backups, and the **Database** ⇒ **Validate** [menu option](#), would fail with a technical error message if you upgraded from a previous version to 4.11b by using the **Tools** ⇒ **Check for Updates** [menu option](#). Now **Tools** ⇒ **Check for Updates** is fine.

#### **Release 4.11b (November 1, 2018):**

- Fixed a bug introduced in release 4.10. It occurs when you are saving receipts to PDF, or [emailing them](#), but only if in the **Maintenance** ⇒ **Receipt Options** [window](#) you are using the built-in receipts, and have selected to not include the Details Table, or not include the Summary Table, or both. The bug was that the excluded table(s) would correctly be omitted when displaying the receipt on the screen or printing it, but would still appear (overlaid on top of the other table!) when saved to PDF or emailed.
- Fixed a bug that gave an error message and prevented the creation of receipts, when you have specified in the **Maintenance** ⇒ **Receipt Options** [window](#) that they are for Quebec (French-only, or bilingual) and that you should Skip Lines between sections of the receipt, when you are receipting donations with [Advantage](#).
- [Restoring](#) database backups is now done in a new way internally. (You should not see any difference.) With this change, users of the BitDefender anti-virus software, who have its SafeFiles module turned on, will no longer have to turn off that module to be able to successfully restore.
- A similar change was made to the **Database** ⇒ **Validate** [menu option](#), doing it in a new way that should not cause problems if BitDefender anti-virus has its SafeFiles module turned on. Also, that menu option is now allowed for the [Local Network Client](#) version.

#### **Release 4.11 (October 18, 2018):**

- Added drill-down capability for fields in many reports that include summary donation totals by donor. Values in those reports are shown in blue and you can click on them. Clicking on them shows a detail report of the donations included in the displayed total for the donor whose total you clicked on. A **Back** button at the top-left corner of the detail report takes you back to the original report.
- Made a change to the **Database ⇒ Import ⇒ Donations menu option**'s processing, that can speed things up (especially for users of the [Web Network Version](#)) after the import is completed. That may also fix problems that a couple of users experienced where the program seemed to hang, or exit, after the import was completed.
- Fixed a problem in the **Database ⇒ Import ⇒ Donors menu option**, which could cause the program to crash, or to not display any added donors, after a successful import. (They would still have been successfully imported, and would be displayed if you exited the program and restarted it, or restarted it after a crash.)
- Fixed a bug in both **Letters ⇒ One Letter** and **Letters ⇒ Mass Mailing** where using a mail merge template designed for one type of merging (for instance, for receipts) was used for the wrong type of merging selected in section 1 of the window (for instance, Donor Information Only). That could give a technical error message and then crash the program, rather than correctly giving some warning messages and showing "FIELD IS MISSING" in a lot of places in the merged document, where there were merge fields that didn't belong to that type of merging.

#### **Release 4.10 (October 4, 2018):**

- Both **Reports ⇒ One Date Donation ⇒ Details and Summary** and **Details with Member/Envelope # and Summary** now include a Summary by Paid By section, as well as the previously included Summary by Category section. So now those reports include everything that would otherwise need to be seen with two separate reports on that **Reports ⇒ One Date Donation sub-menu: Details** (or **Details with Member/Envelope #**) and **Summary**.
- Fixed a problem where the **Help** button in the two [Email Sending Configuration](#) windows opened to the Introduction Help page instead of the correct page.
- This version was created with a new release of the program we use to create DONATION, called PowerBuilder 2017 R3.
- Saving built-in [receipts](#) (but not [mail-merge](#) ones) to PDF, and emailing them, now uses the PDF facility built into PowerBuilder, the program we use to build DONATION, rather than the 3rd party PDF printer novaPDF that is included with DONATION. NovaPDF is still used for saving mail-merge receipts and letters to PDF and emailing them.
- Especially for users of the 5 simultaneous user [Web Network Version](#), made some changes that may speed up some activities that read program [settings](#) from the database. However, they also mean that if another simultaneous user changes certain settings, your program may not "see" those changes until you exit and restart it.
- Fixed a very odd and obscure problem: If you created a [Custom Report](#), then used the [Save As](#) button to save it to formatted Excel, and closed the Excel program after working with it and before you closed the report-viewing window, then you cannot close the report-viewing window, and are stuck. (You can then only exit DONATION by killing it with Windows Task Manager.)

#### **Release 4.06b (August 30, 2018):**

- Removed all restrictions on the minimum dollar amount of [pledges](#), as long as the annual pledge amount (or total pledge amount for multi-year pledges) is greater than zero.

#### **Release 4.06 (August 28, 2018):**

- For multi-year [pledges](#), individual years' pledge amounts can now \$0, though the total still has to be at least \$50. (This was in fact partly true previously, except that if the amount in the current year was \$0, you could not save changes to the Donor on the main window.)
- Added the [Tools Menu](#) option **Explore Temp Directory**, which can be helpful in some tech support situations.

#### **Release 4.05d (August 7, 2018):**

- Fixed a bug introduced recently, for [Local Network Version](#) and perhaps also [Web Network Version](#) users: even though your license key said you could have 5 simultaneous users, if you tried to run the program for a 2nd simultaneous user, it would stop you, with a message that you were only allowed to have 1 simultaneous user.
- In both the **Database ⇒ Import ⇒ Donors** [menu option](#) and the **Database ⇒ Import ⇒ Donations** [menu option](#), if you use the **Browse** button to select a file, the default file type showing has been changed to "Microsoft Excel Documents". You can still change that, with the file type drop-down near the bottom right of the file selection window, to the previous default, "tab-separated File", or to "comma-separated Value File".

#### **Release 4.05c (July 19, 2018):**

- Fixed a strange problem that started in version 4.05 where a couple of users were missing a table (CONNECTIONS) in their database that should have been created many versions of DONATION ago, causing error messages when the program was run after the update.
- Fixed a bug in the **Database ⇒ Import ⇒ All Data** [menu option](#). In many cases if you were unable to run the process in that window because you didn't have the right inputs available, the **Close** button would not be enabled, so it would be hard to exit the window. That option is little-used because we strongly recommend instead using the simpler and more flexible **Database ⇒ Import ⇒ Donors** [menu option](#) and **Database ⇒ Import ⇒ Donations** [menu option](#) instead, if they will be sufficient.

#### **Release 4.05b (July 16, 2018):**

- Fixed a problem introduced by version 4.05 where in the Standalone version, in some places in the program (including when [switching databases](#), or after making a database backup) you could get a message that didn't make sense, like: "You are using the Standalone version of DONATION, but your license key is not authorized for that. Rather, it is authorized for the normal Standalone version ...".

#### **Release 4.05 (July 12, 2018):**

- In the Batch Entry / One Date Donation [window](#), the **Copy Prev** button is now active even if there is only one donation for the current donor on the last date on which donations were entered for them. Previously there had to be at least two.

- There's some new behaviour in date fields, in addition to the existing [keyboard shortcuts](#) for them: When you enter a date field, normally its first component (before the first slash or dash) will become selected (highlighted). Pressing the left or right arrow keys or the forward slash key (/) will cycle through the three components of the date field (month, day and year, in whatever order they are displayed on your computer). That can make it easy to just change one of those components, for instance the day of the month. Once it is highlighted, just type what you want to replace it with - there's no need to delete what is there first.
- Fixed a bug in the update installation program for the Web Network Version, when you use **Tools** ⇒ **Check for Updates**: you would get an error message like "On Post Install ... Attempt to concatenate global pwd1 (a nil value) ...". Although that message should not have come up, it did not actually indicate any problem with the update.

#### **Release 4.04d (June 22, 2018):**

- Fixed a problem that could occur when registering from the program, if your Windows username included a space (like "Dan Cooperstock"), and your default web browser was not Internet Explorer or Microsoft Edge. In those cases, the registration could fail. This same problem could also affect certain other cases where the program opens web-type files that are on your local computer.
- Fixed a problem where the new automated license key retrieval could try to get a license key that was already older than the version of DONATION that you are running, which would not have been appropriate.
- Added a validation to the rarely-used **Database** ⇒ **Import All Data** [menu option](#) to ensure that the CONSTANT.TXT file has exactly one line of data in it.
- Made another correction to the new feature in release 4.04b where entering any arithmetic operator (+, -, \*, /, or an opening parenthesis) in the field, other than a leading minus sign, popped up the [Calculator](#) window. It also popped up if you typed an x or X for times, which was intended, but unfortunately it also popped up if you typed Ctrl+X or Alt+X, which was not intended, and has been corrected.

#### **Release 4.04c (May 28, 2018):**

- The following change was actually made in either release 4.01c or 4.02 (we are not sure which), but we forgot to record it in that version's revision history. Previously when users of versions that allow simultaneous users (Local Network, or Web Network with an appropriate payment level) wanted to create receipts, no other user could be logged in at the same time. Now other users can be logged in - they just cannot also be creating receipts at the same time. As soon as the user creating receipts exits from viewing the receipt (and possibly printing it, emailing it etc.), another user can create receipts.
- Made a correction to the new feature in release 4.04b where entering any arithmetic operator (+, -, \*, /, or an opening parenthesis) in the field, other than a leading minus sign, popped up the [Calculator](#) window. It should have popped up only when you had actually just typed one of those characters, but instead, it would pop up any time you typed any character at all, if one of those arithmetic operators was contained in what you had already typed.

#### **Release 4.04b (May 24, 2018):**

- Like the change to the Web Network Version made in Release 4.03b, if you are using the [Cloud Storage Service](#) and you leave the program inactive - not doing anything in it - for two hours, you will be disconnected, so as to not block other users from using it. The best

practice if you will not be using it for a while is to exit the program, and restart it when you wish to use it again.

- The **Maintenance** ⇒ **User Administration** ⇒ **Administer All Users** window for the Web Network Version now allows Administrators to reset passwords for other users, and unlock other users who have become locked out by too many unsuccessful login attempts.
- Many fields for entering currency amounts will now open a new [Calculator](#) window, if you enter any arithmetic operator (+, -, \*, /, or an opening parenthesis) in the field, other than a leading minus sign.

#### **Release 4.04 (May 9, 2018):**

- For users of the Standalone and Local Network versions, the [software licensing](#) has been changed. Now in most cases, if you have an Internet connection, new or updated license keys can be retrieved directly and instantly from our server, rather than having to send an email request to Software4Nonprofits and wait for a person to send you the key.
- Creation of new empty databases (for instance during an initial install of the program, or with the **Database** ⇒ **Switch Databases** [menu option](#)) is now done by copying from the empty database file DONATION4.EMPTY, rather than by doing a database restore from the database structure backup file DONATION4.metadata. That should solve some problems caused by some anti-virus programs, that prevent certain writing to directories under C:\Users\Public, which is where the program's [Data Directory](#) is created.
- Changes to your Organization Name in the **Maintenance** ⇒ **Organization Info** [window](#) no longer require licensed users of the Standalone or Local Network versions to request an updated license key. Instead, the changed name will automatically be written into your license key file.

#### **Release 4.03b (April 27, 2018):**

- In the [Web Network Version](#), if you leave the program inactive - not doing anything in it - for two hours, you will be disconnected, so as to stop using up server resources and not block other users from using it. The best practice if you will not be using it for a while is to exit the program, and restart it when you wish to use it again.
- Web Network Version users with Read-Only permissions can now change their login passwords, and other information for themselves, with the **Maintenance** ⇒ **User Administration** ⇒ **Edit Your Login** menu option. Previously the User Administration menu under Maintenance wasn't even visible for Read-Only Web Network Version users. Also, if Read-Only users use **Maintenance** ⇒ **User Administration** ⇒ **Administer All Users**, while they cannot use that window, the program offers to show them a list of the Administrators, who **can** use the window.
- In the [Batch Entry](#) window, added a limitation to typing at most 50 characters in the Description field, if you are choosing to display that field. Previously if you entered more than that, you would receive a techie error message and would not be able to save the batch.
- Adjusted a change made in version 4.02e: now when you make the program's main window or [Batch Entry](#) wider, there is a maximum width the Description field will widen to (enough for about 50 capital letters), if it is displayed. With the previous change it could expand to ridiculous widths, for instance if you maximized those windows.
- Any action in the program that needs Internet access now first checks that you are connected to the Internet, and if not, gives you a chance to connect and try again.

#### **Release 4.03 (April 12, 2018):**

- Fixed a bug for users upgrading for the first time from a release prior to version 3.80 (released in April 2016), where it could not do a required minor update to the database structure.
- Fixed a bug when using the [Web Network Version](#) - its **Upload/Download** ⇒ **Download Web Database to Local** menu option gave an error message "Your backup file on the server that was created for this download process could not be deleted ...". In fact the message was incorrect - there was no problem with the download process.
- The installation program is now digitally signed with what is called an "Extended Validation Code Signing Certificate", which may help prevent things like Microsoft's SmartScreen Filter or Windows Defender from incorrectly objecting to downloads - which have nothing wrong with them.
- Removed the **Create ID** button from the **Backup/Restore** ⇒ **Backup Frequency and Options** [window](#) for the versions other than the Web Network Version (which doesn't have that menu option). Now, various options in the program, including registering, requesting a license key, and turning on Internet Backups in the Backup Frequency and Options window, automatically generate a Unique ID if you don't already have one, so that button is no longer needed.

#### **Release 4.02i (April 11, 2018):**

- Fixed a bug that caused a crash if you tried to use the Upload feature when first initializing the [Web Network Version](#), or either of the **Upload/Download** menu options after it had been initialized.

#### **Release 4.02h (April 8, 2018):**

- Changed **Backup/Restore** ⇒ **Backup Database** so that if you choose to back up to a USB memory key, it does the backup directly to there in one step, as long as there seems to be sufficient space on the USB. Previously it always first did the backup to the Backup subdirectory of the program's [Data Directory](#), then copied it from there to the USB.
- Added a small section on getting Yahoo email accounts configured for successful email sending in the [Email Sending Configuration](#) help page.
- Fixed a bug that crashed the Lite version if you tried to use the **Reports** ⇒ **Report Browser** [menu option](#).

#### **Release 4.02g (March 23, 2018):**

- Fixed a bug introduced in version 4.02, which for some users was causing it to not be able to do a needed conversion to the MEMORIZED\_REPORTS database table.

#### **Release 4.02f (March 22, 2018):**

- Fixed a problem with [registrations](#) done within the program, which weren't always working properly when they were forwarded to the website. Also removed a step from this process, so you no longer have to also click Submit on a web page to complete the registration, when it is started within the program.

#### **Release 4.02e (March 20, 2018):**



- Improved the management of connections to the server database in the [Web Network Version](#).
- Fixed a error that some users could encounter when upgrading to release 4.00 or later, with messages about failure to update the memorized reports.
- Changed the wording of version numbers, like this 4.02e, to "Release #4.02e", to avoid confusion with how we use the same word "version" for the named versions of the program - Lite, Standalone, Local Network and Web Network Versions.
- In the Web Network Version, any of the following changes will now invisibly send an email to us, to make sure we keep our contact information for your organization up to date: Changing the Organization Name in **Maintenance** ⇒ **Organization Info**, changing your name or login email address in **Maintenance** ⇒ **User Administration** ⇒ **Edit Your Login**, or any additions or deletions of users or changes of user access levels in **Maintenance** ⇒ **User Administration** ⇒ **Administer All Users**.
- When you make the program's main window wider now, when possible the Description field will widen along with the window, if it is displayed. The same applies to the [Batch Entry](#) window if you are displaying the Description in it.

#### **Version 4.02d (March 2, 2018):**

- For users of the Web Network Version, if a Program Entry Password had been set in a previous version, don't still prompt for it after doing the Web Network Version login.
- Changed the default sort order of donations on the main window, for new users, to "Newest to Oldest". That shows the most recent donations, and the blank line for entering donations, at the top. This can also be changed in the **Maintenance** ⇒ **Main Window Options** window, on the [Donations tab](#).
- Added a section to the Help topic "Generating Charitable Receipts" about printing on A4 paper.

#### **Version 4.02c (February 27, 2018):**

- Fixed a possible bug for users whose Windows usernames are longer than 8 characters, where backup or restores might fail.

#### **Version 4.02b (February 21, 2018):**

- Further fixed the fix in version 4.02 about potential problem data in Donor Comments fields that could allow your database to be backed up, but not restored, with the new version of the Firebird database software.

#### **Version 4.02 (February 20, 2018):**

- Added a new version of DONATION, the [Web Network Version](#), that is still installed on your Windows computer but has its database on a Software4Nonprofits server. See [Multiple User Options](#) for the pros and cons of using this version.
- The program is now using a newer version of the Firebird database software. This means that if you are sharing the same database between multiple users, all of the computers running DONATION **must** be upgraded. Otherwise, when you transfer a database from a

program running the new versions of DONATION and Firebird to one running the older versions of both, the database will not be able to be restored.

- Renamed the existing [Network Versions](#) of DONATION to be called the "Local Network Versions", to more clearly distinguish them from the Web Network Version.
- Changed the fix made in version 4.01c, to a problem where some users of the [Cloud Storage Service](#) found that their computers could not communicate with it, and got a message that said incorrectly that they might not be connected to the Internet or might need to make a rule in their firewall to allow access. This is now done in a better way.
- Added **Reports** ⇒ **Administrative** ⇒ **User Login History**, which shows all dates and times that any user logged on or off of the program, in descending date order (latest first), for any range of dates.
- Added an option "Seconds to Pause between Emailing Receipts" to the **Maintenance** ⇒ **Receipt Options** [window](#), for the occasional user whose email provider won't let them send more than one email every some number of seconds, without stopping them due to concerns about spamming.
- All importing and converting of data from other programs has been changed to show progress, by counting up the number of rows saved back to the database, after every 10 rows. This includes [Importing All Data](#) from text files, and converting from [Membership Plus](#), [GiftWorks](#), [Geminon](#), or Wincrafters [Church Assistant](#).
- A progress bar is also now shown during the save operations in the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#), the **Database** ⇒ **Import** ⇒ **Donations** [menu option](#) and the **Database** ⇒ **Reassign Envelope Numbers** [menu option](#).
- Removed the **Backup/Restore** ⇒ **Restore Old Database (DONATION3.DB)** menu option, because it was only needed for conversion from version 2.70b or earlier of DONATION (released in 2007 or earlier), and almost no users should still need that. See Converting Data from Prior Versions if you do need that.
- When using the **Database** ⇒ **Import** ⇒ **From Church Assistant** [menu option](#), the program will now give you an option to import the data even if it is two or more years old. Previously it would refuse to do that.
- Fixed potential problem data in Donor Comments fields or Memorized Reports contents, that could allow your database to be backed up, but not restored, with the new version of the Firebird database software.
- Fixed bugs where the **Help** buttons in both the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#) and the **Database** ⇒ **Import** ⇒ **Donations** [menu option](#) didn't take you to the right help page.
- Fixed a bug in the **Database** ⇒ **Import** ⇒ **Donations** [menu option](#) where if you used the "Adjust to Current Month" or "Adjust to Last Month" checkboxes, but the month they adjusted to was not in the year you were working on in the program, the import could still happen, putting donation dates into that working year that were not actually in that year.
- Fixed a bug in **Receipt** ⇒ **Duplicate/Corrected by Number**, where if you enter a receipt number that doesn't exist in the current year's data, you get an inappropriate error message saying "Error retrieving receipts information from the database". Now it properly tells you that there is no such receipt number.
- Fixed a bug when entering or editing donors: if you entered just spaces in the Business Name field, that would still cause the program to think there was a business name, and end up displaying nothing on the row for it in the Donor List, and on some reports.
- Fixed a bug in **Receipt** ⇒ **Current Donor Sample**: If you create a sample mail-merge receipt with it, then use the **Maintenance** ⇒ **Receipt Options** [window](#) to switch back to using the non-mail-merge receipts, and use **Receipt** ⇒ **Current Donor Sample** again, it will not have the "SAMPLE" watermark on it that it should have.

- Fixed a bug in the new **Correct** button on the main window, for [correcting](#) already receipted donations. Previously it would allow you to make a change to a donation that made it be [non-receiptable](#), but when you then printed the corrected receipt, that donation would still be included. Now you are prompted to confirm that you want to change the donation to be non-receiptable, and if you confirm that, the receipt number is removed from that donation so that it is no longer included when print the corrected receipt.
- If you have specified logo and/or signature [images](#), previously they were loaded from the database every time you started the program. Now they are only loaded when they are needed, for instance if you are creating receipts or mail-merge letters. (This should make no difference, except for saving time during the start-up of the Web Network Version.)
- A few users reported instances of emailed receipts having the message "You created this PDF from an application that is not licensed to print to novaPDF printer" on the bottom of the page, although DONATION is indeed licensed. Added a bit of further diagnosis that will pop up a message and stop the emails from being generated if the passing of the license information from DONATION to novaPDF fails, which would cause that behaviour.

#### **Version 4.01c (January 30, 2018):**

- Fixed a problem where some users of the [Cloud Storage Service](#) found that their computers could not communicate with it, and got a message that said incorrectly that they might not be connected to the Internet or might need to make a rule in their firewall to allow access.

#### **Version 4.01b (November 15, 2017):**

- Fixed a bug introduced by version 4.01: Many users couldn't save reports to PDF with the **Save PDF** button in the report-viewing window.
- Fixed another bug introduced by version 4.01, if you used the **Receipt ⇒ Current Donor Duplicate/Corrected** or **Duplicate/Corrected by Number** [menu options](#) (or for Canadian users, the same menu options under **Receipt ⇒ Gift in Kind Receipts**). If you chose "Also include any unreceipted donations for the same donor" in those windows, it would fail, with a message about "Cannot save receipt number information back to the donation records in the database" and some SQL error details.
- Fixed another bug introduced by version 4.01: various fields in the **Tools ⇒ Register Online** [window](#) wouldn't allow long-enough entries, particularly the Email Address field, which gave an error message saying that what you entered wasn't a valid email address, if it was longer than 13 characters!
- Fixed another problem in the **Tools ⇒ Register Online** [window](#): if you had previously registered, and then went to that window, then clicked **Cancel** rather than **Submit**, then the next time you ran DONATION you would get the [window](#) prompting you to register or to say that you had already done so.
- Fixed another long-standing bug with the startup [window](#) prompting you to register or to say that you had already done so: if you chose to Register from there, the same window would still be displayed the next time you started the program, and would keep being displayed unless you clicked the "Already registered" button. Now it won't, if you click to Register Now and do Submit the registration.
- Changed the validation of email addresses you enter in the program to allow for the final part after the last period to be up to 18 characters long (the previous limit was 8, and one user encountered an email address that was valid but that DONATION wasn't allowing).

#### **Version 4.01 (November 13, 2017):**

- Added a **Correct** button above the rows of donations, which can be used to make corrections to already receipted donations, and then immediately create a corrected receipt including that corrected donation. See [Editing a Donation](#) for details.
- Added a right-click popup menu on donation fields on the main window, with options Delete and Correct, that do the same things as those buttons in the row of buttons above the donation details.
- We recently found out that for what they call donations with Advantage, the Canada Revenue Agency requires that a description of the advantage be printed on the receipts. Many changes were made to the program to accommodate that, for Canadian users. See [Donations and Receipts with Advantage](#) for full details. However, the following are a few of the changes for Canadian users:
  - Added a new optional donation field Description of Advantage (also sometimes called Advantage Description) where you can enter that description. (For non-Gift in Kind receipts, you can alternatively enter that description of the Advantage in the existing Description field).
  - Added alternate versions of all Canadian English and French receipts - both the built-in ones and the mail-merge ones - for donations with Advantage, that print the description. Such receipts are always one receipt per donation, because of the fact that they have to include the description of the advantage.
  - When you create receipts and there are receiptable donations both with and without advantage, the program will ask you which ones you want to create receipts for - you cannot mix such donations (with and without advantage) on the same receipts or in the same batch of receipts.
  - New checkboxes in **Maintenance ⇒ Receipt Options, Letters ⇒ One Letter** and **Letters ⇒ Mass Mailing** to allow you to edit and/or merge with the special templates for receipts for donations with advantage.
  - In mail-merge letters for individual donations, or for receipts with advantage (including Gift in Kind ones) include a new merge field «AdvantageDescription».
  - The **Reports ⇒ Custom Reports** [window](#) now includes the Description of Advantage in the fields that can be selected for Donations, as long as you are displaying that field.
  - The first time Canadian users run the program after upgrading to this version (or to a later version, from an earlier one), if you have any receiptable donations that are missing descriptions needed to create receipts for them, you will be given a message informing you of that fact.
  - For Canadian users, added a new Notes column to **Reports ⇒ Donation ⇒ Unreceipted**, which can show "Missing Description" for donations where a description is needed to be printed on the receipt, but has not been entered. This applies to both [Gifts in Kind](#) and donations with Advantage.
- Added another way to access **Reports ⇒ Donation ⇒ Unreceipted**, through the new menu option **Receipt ⇒ Unreceipted Donations Report**.
- All Canadian receipts show the new web address (URL) for the Canada Revenue Agency's pages about charities: [www.canada.ca/charities-giving](http://www.canada.ca/charities-giving) in English, or [www.canada.ca/organismes-bienfaisance-dons](http://www.canada.ca/organismes-bienfaisance-dons) in French. However, if you use [mail-merge receipts](#) and have edited their contents, you will have to make the changes to those web addresses yourself, by editing them with the button in the **Maintenance ⇒ Receipt Options** [window](#).
- Similarly, for Canadian users, if you use mail-merge receipts and have added text to them (such as a cover letter) and will be doing any of the new receipts for donations with

Advantage, you will have to make those same changes as you made in the existing receipt template to the new templates for receipts with Advantage.

- Added **Reports** ⇒ **Donation** ⇒ **All Donations** ⇒ **Sort by Date, All Fields**, which is visible only if you are displaying the donation Eligible Amount field. As well as fields displayed on other reports on that sub-menu, it also displays the Eligible Amount and Advantage Description fields.
- Corrected both the Help on the **Reports** ⇒ **Fiscal Year** [sub-menu](#) and the text in the [Report Browser](#) to show that its reports **Donation Details, Sort by Date** and **Donation Details, Sort by Name** can be selected to be restricted to one donation category, if you wish. (That could also have been done with the [Filter](#) button, of course.
- Corrected a bug when creating a multi-year [pledge](#) for organizations with a fiscal year different from the calendar year, where it could calculate the End Date to be a fiscal year end prior to the Start Date. In fact, multi-year pledges are currently only allowed to be for calendar years, so the End Date is now calculated based on calendar years rather than your fiscal year, eliminating this bug.
- Saving reports to PDF uses a new facility for doing that which is built into PowerBuilder, the program we use to build DONATION, rather than the 3rd party PDF printer novaPDF that is included with DONATION. NovaPDF is still used for saving receipts and mail-merge letters to PDF and emailing them.
- Added a section to the [Multiple User Options](#) help topic on the upcoming Web Network Version of DONATION.

#### **Version 4.00b (August 30, 2017):**

- Changed the installation program to automatically fix problems that a few users were having, where for some reason it could not overwrite files in the program's installation directory, so the install failed.

#### **Version 4.00 (August 25, 2017):**

- This version uses a newer version of PowerBuilder, the program we use to create DONATION, and as such we are giving this release a new main version number (4.00).
- When converting from [Membership Plus](#) databases, added handling for two never-before seen problems in the Membership Plus data: too-large internal Fund IDs (a number you don't see) that don't fit in the internal donation category numbers in DONATION (that you also don't see), and missing funds (donation categories) for donations. The donations with missing funds will be assigned your first donation category.
- Fixed a very unusual problem when creating [Bank Deposits](#), where you click the **Deposit Slip** button and it won't do it because it says the total cash from the donations being deposited doesn't match the Cash Count, even though it says the amounts are the same!
- Fixed the [Membership Plus conversion](#) so it can now work with Membership Plus version 5.0d, which has an internal version number of 4.93, which made the program think it wasn't at least version 5 (the minimum version it knows how to convert).

#### **Version 3.86 (June 29, 2017):**

- Added both [Custom Reports](#) and a section listing all of your [Memorized Reports](#) at the end of the list in the [Report Browser](#), unless you are using the [Lite version](#) that doesn't include Custom or Memorized Reports.



- [Memorized Reports](#) can now have optional Descriptions added to them, in addition to their name. The Descriptions can be added when you are memorizing them, or on the Memorized Reports window itself.
- Added some details about a couple of powerful free WYSIWYG (what you see is what you get) HTML editors that you can use from our [internal](#) mail-merge editor, for things that cannot be done in the internal editor, to the page [Configuring an Alternate HTML Editor](#).
- Fixed a bug in the **Database** ⇒ **Switch Databases** [window](#) where uses of the Browse button always gave a message that the selected file wasn't in the correct directory.
- In the **Reports** ⇒ **Memorized Reports** [window](#), after running a report, and closing the window(s) doing that took you to, you return to the Memorized Reports window. (Those other windows can be the main Reports window, or the [SQL Select](#) window.) Fixed a weakness where the information about the list of reports in the Memorized Reports window is not updated on that return. That could be necessary if you made changes and re-memorized the report in one of the windows you were taken to. Without this fix, re-running the same memorized report immediately would ignore those changes. Also, any new memorized reports with new names would not have appeared on the list in this window when you returned to it.
- Fixed a bug when you use the **Delete** button in the Memorized Reports [window](#), where you got an error message and the report didn't disappear from the list. (It actually was deleted though.)

#### **Version 3.85e (May 30, 2017):**

- When converting [Membership Plus](#) databases into DONATION, the program now allows for two previously unseen problems in the Membership Plus data: duplicate Fund IDs, and organization Members with no name fields filled in at all.
- For Australian DGR recipients, one line of the built-in receipt was too wide on A4 paper, so adjusted that some.

#### **Version 3.85d (April 21, 2017):**

- The rules for determining whether a donor or donation is [non-receiptable](#) have been changed to be case-insensitive, so for instance the value "NON-RECEIPTABLE" will now also work for a Cheque # / Paid By or donor or donation Category value, and Category values will work that start with "nr" or end in " nr", to make the donor or donation non-receiptable.
- If you have set a [Receipt Password](#), entering it is now required for the **Receipt** ⇒ **Delete Range** [menu option](#), when it was not required for that before.
- You can now enter the Receipt Password in place of the Program Entry Password when you start the program, if both are set up. If you do that, you will not also be prompted for that Receipt Password if you use any of the **Receipt** menu options that normally require it, during that run of the program. (The Help page on [Passwords in the Program](#) has always stated that this was allowed, but either that was never correct, or we accidentally broke that capability at some point - we're not actually sure which!)
- Fixed a bug in the «DetailsTable» field for [Pledge](#) mail-merge letters, if the Pledge type set in the [Pledges](#) tab of **Maintenance** ⇒ **Main Window Options** was one with a Start Date: donations made exactly on that Start Date, that were part of the pledge, were omitted from the results of the «DetailsTable».
- The program does not display properly if you have Windows 10 and have set your display into Tablet Mode, so if that is the case, you now get an error message with instructions for turning off Tablet Mode, and the program exits. You can restart it after turning off Tablet Mode.



**Version 3.85c (March 24, 2017):**

- Changed the messages that come up if you try to [backup](#) or [restore](#) using a UNC path (such as \\computername\path\...). Previously that never (or at least almost never) worked, and you got a hard to understand techie error message from the Firebird database software. Now you get a clearer message, earlier, directly from the program. (This change was actually in version 3.85, or perhaps 3.85b, but we forgot to mention it before this.)
- Added a [section warning](#) about ways you can print mail-merge receipts that will cause them to **not** be saved back to the databases, in the Help topic on Generating Receipts using Mail Merge. Also added a message about that problem if you go into **File** ⇒ **Print Preview** when viewing a [mail-merge receipt](#), because that print preview window has a Print button that the program cannot detect the use of, and thus causes the receipt to not be saved.
- When [saving reports to files](#) with the **Save As** button, there is now an option to open reports saved as HTML in Excel, in addition to opening them in your default web browser. However, that is likely to come out worse in most cases than if you save them directly as Excel.
- Reorganized the **Tools** ⇒ **Register Online** [window](#), splitting the fields up into groups for Organization Information, Contact Person, and Other Comments.
- When using [Batch Entry](#), previously it would allow you to enter a [Gift in Kind](#) without a Description. Now it won't. (Normally it makes more sense to enter Gifts in Kind on the program's main window anyways.)

**Version 3.85b (February 26, 2017):**

- Fixed a problem when you are doing [Email/Print on receipts](#), if you choose to do the Print part to the "novaPDF Pro v7 for DONATION" printer to get a PDF containing all of the ones that are to be printed rather than emailed. It would previously give you the message "You created this PDF from an application that is not licensed to print to novaPDF printer" at the bottom of each page of the PDF. Now it doesn't. For normal built-in receipts, you would choose that printer with the **Print Setup** button, print to clicking **Email/Print**. For mail-merge receipts, you get to select the desired novaPDF printer in the Printer dialog box that comes up.
- If you are using the [Cloud Storage Service](#), and you enter a different Internet Backup Password on program startup from the last one you used, the message asking you to confirm whether or not you actually want to change the password to a new one is clearer, and you are asked a 2nd time to confirm it, if you answer that you really do want to change it. This should help to prevent accidental changes to the password.
- Fixed a rare problem in the editor/viewer for mail-merge letters and receipts, where you get a message about "Null object error in of\_focus event" and the program crashes.
- Fixed a bug where if you were doing [fiscal year data entry and receipting](#), the **Database** ⇒ **Copy Missing Donors** [menu option](#) would give error messages and not work.

**Version 3.85 (January 31, 2017):**

- When you are [editing donor details](#), when there are empty address lines with a filled-in line following them, they are moved up. For instance, if Address Line 1 is empty but Address Line 2 is filled, in line 2 is moved up into line 1, and similarly with lines 2 and 3. (This change was actually made in version 3.82, but we failed to mention it in the revision history for that version until adding it in there, and here, now.)

- When you are [Importing Donors](#), empty address lines have following filled-in address lines moved up into them, just like when you are editing donor details as described in the previous point.
- If you are [emailing](#) just a single receipt or letter, and there is a problem sending that email, the error message you receive should now be more informative. Other emailing error messages will also now be more informative, and the email log file that it may offer to show you should also now always be correct. (Previously sometimes it was not showing the log file from the actual error that was relevant.)
- Many reports that included donation category names would not print the entire name if it was long, especially if a lot of capital letters were used. Most of those reports should be fixed now to work with virtually any donation category name that you can enter. (They are a maximum of 20 characters long.)
- Fixed a problem that could prevent database schema updates from version 20 or 21 to the current version to fail, with error messages about an unknown column named BANK\_DEPOSIT\_DATE.

#### **Version 3.84i (January 21, 2017):**

- Sometimes the **Tools** ⇒ **Fix novaPDF Problems** [menu option](#) would not succeed because DONATION was running while the fix program was running. Now you are prompted to allow DONATION to exit prior to running the fix.
- In the selection window for **Reports** ⇒ **Donor** ⇒ **Contact Information**, you can choose between reporting on all donors, or only donors with donations within a specified date range. However, the heading text of that window previously said you could also select it only for the currently selected donor, which was not correct. That incorrect wording was removed.

#### **Version 3.84h (January 10, 2017):**

- Made a correction to the fix in the [Cloud Storage Service](#) made in version 3.84g, to not mess things up if the user's Windows username has a space in it.
- Increased the [warning wording](#) in both the program and this Help file about the fact that editing mail-merge receipts or letters in Microsoft Word can damage them, causing merge fields to not merge. Also added a messagebox explaining how to identify and fix merge fields that did not merge because the file was damaged by editing it in Word.
- In the Bank Deposits [window](#), changed the way deleting a retrieved existing bank deposit works, to fix a bug where the delete failed if not all the donations that were originally in the deposit were retrieved into the details area of the window. (That could happen, for instance, if the donation category of one of those donations was changed to one without an associated accounting program income account.)
- In the **Maintenance** ⇒ **Change Password** ⇒ **Internet Backup Encryption Password** [menu option](#), it now allows passwords of length up to 20 characters (previously only 10), and only accepts a change if the password is sufficiently strong (see [Passwords for Email and Internet Backups](#) for details).
- In the **Database** ⇒ **Delete Old Data** [menu option](#), corrected it to behave as described in the Help, namely to allow deletion of data up to the year three years before the current calendar year (for instance, deleting up through 2014 if it is now 2017). Previously, due to a programming error, it forced you to retain one more than that.
- Added several references in various Help pages to the use of the phrase "contribution statement" in the U.S.A. to refer to what the program always calls "receipts".

Version 3.84g (January 3, 2017):

- Made a fix to the [Cloud Storage Service](#) so that if the user's Windows username has accented characters in it, they do not cause problems, which previously they did.
- Added a bit to the Help topic on [Importing Donations](#) about importing multiple years of donations when you first start using the program.
- Made some improvements to the Help topic [Year End Procedures](#) to add further clarity.

Version 3.84f (December 21, 2016):

- Further improvements to the changes in version 3.84e.
- Fix a problem where some users were observing that if they had Internet Backups configured, after the normal backup was done, and it prompted for the Internet Backup Encryption password, the focus would be in the main window instead of that window prompting for the password.

Version 3.84e (December 21, 2016):

- Changed how the program updates the database structure, so that if some updates have somehow been missed in the past, the program can go back and do them, rather than exiting because a later update cannot be done.

Version 3.84d (December 20, 2016):

- When you are [Importing Donations](#) with **Database** ⇒ **Import** ⇒ **Donations**, previously if there was a donation category in the import file that wasn't already on the list of such categories in the program, the import would stop with a message that you needed to add that category manually. Now the import routine will automatically add any new categories for you.
- Further fix in the **Deposit Slip** report introduced in version 3.84, to separate out lines for cheques on different dates, if you have not entered a Cheque # / Paid By value for them at all. (With the fix in version 3.84c, would already separate them out correctly, whether they were on the same or different date, as long as the Cheque # / Paid By values were different.)

Version 3.84c (December 18, 2016):

- In the new **Deposit Slip** report introduced in version 3.84, if a cheque was split into several donation lines because it was for multiple donation categories, it will now be summed up into one line in the list of cheques in the report. Previously there would have been one line for each donation line.

Version 3.84b (December 14, 2016):

- Fixed a bug that caused version 3.84 to crash for users with the [Cloud Storage Service](#) turned on.

Version 3.84 (December 13, 2016):

- Added a new [Donors Only Password](#), for users who should be able to see and change donor information but not financial information. Also separated out a Help page on [Passwords in the Program](#).
- Multiple changes related to allowing for counting cash and creating bank deposit slips in the program:
  - Added a new "Word for Cash" field in the **Donations tab** of **Maintenance ⇒ Main Window Options** to specify the word you use in the Cheque # / Paid By field for cash donations (defaults to "Cash"). It is needed to identify which donations in Batch Entries or Bank Deposits are considered to be cash.
  - Added a new window for [counting cash](#), accessed via a new **Maintenance ⇒ Count Cash** menu option, or new **Count Cash** buttons on the [Batch Entry](#) or [Bank Deposit](#) windows.
  - You can now print a [report](#) that may be usable as a deposit slip from the Bank Deposit window, with a new **Deposit Slip** button.
  - Added the **Reports ⇒ Bank Deposit ⇒ One Deposit Slip report** to reprint those same deposit slips from [Bank Deposits](#) you have specified.
  - On the Bank Deposit window, changed the previous **Print** button to read **Report**. It displays the existing bank deposit details report.
- In the **Reports ⇒ Bank Deposit ⇒ One Deposit Details report**, moved the Summary by Category and Summary by Paid By sections of the report to be side by side, to save room.
- Added a new Help topic on the [main window](#).
- When DONATION exports Excel files to text files for importing in various places (for instance in the **Database ⇒ Import ⇒ Donors menu option**) it now exports to Unicode rather than ANSI text, which means that characters in various other languages should now be imported correctly.
- Fixed a bug when re-retrieving an existing [bank deposit](#) in **Maintenance ⇒ Create Bank Deposit**. If there were further donations that matched the retrieval conditions, that weren't already saved in that bank deposit, previously they would come up with "Include" checked, and the **Save** button would be disabled (greyed out), so you couldn't save that, unless you unchecked then checked one of the checkboxes. Now those additional donations come up with "Include" unchecked, so you can decide whether or not to include them (possibly by clicking the **Select All** button) and then **Save** your change.
- Fixed a bug when [importing donors](#). If a Category1 or Category2 value being imported contained a single quote (such as "John's Bookkeeping"), and there was more than one occurrence of it, the import would fail with a technical message that indicated it was trying to insert duplicate values into the database. Plus, one copy of that category value would actually already have been imported into the appropriate Donor Category table in the database (viewed with **Maintenance ⇒ Donor Category 1 or 2**) but modified to include a tilde character before the single quote (like "John~'s Bookkeeping").
- Fixed a bug in the **Letters ⇒ Mass Mailing menu option**: If you chose to just Export the data instead of merging it, the LastYearAmount column would always be empty.
- Corrected several places in this Help file (all in pages about Importing) that said that a Member/Envelope Number could be 10 digits long. It can actually only be 9 digits long.

### **Version 3.83 (November 15, 2016):**

- For Canadian users, using distinct receipt formats for [Gift in Kind](#) donations is now enforced by the program, because it is required by the Canada Revenue Agency (CRA). Previously it was an option. The "Use different receipts for Gifts in Kind / Non-Cash Gifts" checkbox previously shown on the **Maintenance ⇒ Receipt Options window** for Canadian users was thus removed.

- Canadian users of the free feature-limited [Lite](#) version can now also create distinct Gift in Kind receipts, since they are required by the CRA, and can enter Description fields and appraisals for donations. (Those donation fields were previously also not allowed in the Lite version, because they were most often needed only for Gift in Kind receipts.)
- For Canadian users, when doing **Receipt ⇒ Reprint Range** or **Receipt ⇒ Gift in Kind ⇒ Reprint Range**, if some or all of the receipts in the range to be reprinted are of the wrong type (Gift in Kind versus regular) you will now get appropriate warning messages about that.
- Changed **Database ⇒ Copy Missing Donors** to bring up a [window](#) that allows you to copy donors and categories from any year (and any intervening years) to any other year, instead of having two sub-menu options for copying forward or back one year.
- When you use the **Reports ⇒ Custom Report [menu option](#)** and do a report over a range of more than 2 years, if there are donors in prior years included in the report that are not in the last year, previously they would be excluded from the report. Now, in that situation you are prompted with an option to do the equivalent of **Database ⇒ Copy Missing Donors**, in order to get all required donors into the last year for the report, to make sure none are missed.
- Added **Reports ⇒ Donor ⇒ Non Donors**, that lists all donors in the current year's list that have never donated, with the number of years they have been in the system for.
- Added **Reports ⇒ Bank Deposit ⇒ All Donations with Deposit Status**, which shows every donation with a range of dates that you specify, with whether they have already been included in a bank deposit, or will be omitted from a new bank deposit, and if so why, or would be included in a new bank deposit. This report can be used to help figure out why donations that you think should be included in a bank deposit aren't being retrieved when you try to create a new [bank deposit](#).
- Made several small improvements to the **Maintenance ⇒ Change Password** menu options:
  - You now cannot set up a Limited User or Read Only password if the Program Entry and Internet Backup passwords are identical. (That's because all users should know the Internet Backup password, if one is set up, but then the more limited users would also know the Program Entry password.)
  - You now can't set the Program Entry and Internet Backup passwords to be identical if a Limited User or Read Only password is already set up, for the same reasons.
  - You now can't set any of the Program Entry, Receipt, Limited User or Read Only passwords to be identical to each other.
- Both **Reports ⇒ Donor ⇒ Addresses** and **Addresses by Member/Envelope Number** now include a field for the total amount given by the donor in the current year, which can be [filtered](#) on, but is not actually displayed on the report.
- In the **Database ⇒ Import** sub-menu options for importing data from [Membership Plus](#), [GiftWorks](#) and [Geminon](#), negative amounts can now be imported. Previously they would be omitted from the conversion. (This change was possible due to the change in version 3.80 to allow turning on an "Allow Negative Amounts" option in the [Donations](#) tab of **Maintenance ⇒ Main Window Options**.)

#### **Version 3.82b (October 18, 2016):**

- Added the **Help ⇒ Search by Topic or Keyword** menu option, that actually just brings up a messagebox giving you instructions for how to do that, but also has buttons that take you either to the Help file where you can use the Index for searching, or to the [How to Use Help](#) help page for further instructions.
- Changed **Help ⇒ Contents and Index** so that it always opens on with the Index showing, which we believe is the most commonly helpful option. Previously it would show whichever of



the Contents, Index, Search or Favorites tabs that you had last been on when you used the Help file.

### **Version 3.82 (September 12, 2016):**

- If you select the [pledge type](#) "Annual with Start Date and Category", there is a new Pledge information letters [mail-merge field](#): «TotalAmountAllCategories». It gives the total of all donations for the year, whether or not they are for the pledge category. It will always be the total of the donations listed in the «DetailsTableAllCategories:...» field.
- For users who are not in Canada (based on the setting in the **Maintenance ⇒ Receipt Options** [window](#)), you are now allowed to leave donors' Address Line 1 fields empty. For Canadian users it is still required, because the Canada Revenue Agency requires a donor's complete address to be printed on receipts. When importing donors from files, or converting from other software systems, there are new messages and behaviours for Canadian users when a donor to be imported is missing an Address Line 1 value.
- When you are editing donor details, when there are empty address lines with a filled-in line following them, they are moved up. For instance, if Address Line 1 is empty but Address Line 2 is filled, in line 2 is moved up into line 1, and similarly with lines 2 and 3.
- Added a new Help topic, [Handling Anonymous Donations](#), which is something people often ask us about.
- Resolved a problem when [Converting from Membership Plus](#) databases, where the import would fail if there were Member rows in the Membership Plus database with no internal Member ID field value. (That should not be possible, but was happening with one user's data.) Now such rows are ignored. We are quite sure they could not have had associated donations, so that should not be a problem.
- There is a new **Tools ⇒ Fix novaPDF Problems** [menu option](#), which downloads and runs a program from our website to uninstall and reinstall the novaPDF PDF printer, to fix problems that sometimes come up (for instance if you uninstall the printer driver, or delete some of its files). The program is also using a newer version of novaPDF.
- When you are installing a license key or evaluation extension key, the program now removes unexpected characters (which might be invisible!) from the lines before doing anything else, to correct unusual errors in the copy and paste process of putting the key into that window. It also checks the lengths of those lines of the keys after that, and doesn't proceed if they are an unexpected length.
- For the statement-type reports, **Reports ⇒ Donation ⇒ Details, One Page per Donor** and **Reports ⇒ Donation ⇒ Category Totals, One Page per Donor**, if you emailed them, the text body of the email that you specified should have been saved and redisplayed for you to use the next time you emailed them. But it wasn't - now it is.

### **Version 3.81 (June 14, 2016):**

- The **Receipt ⇒ Filtered Donors** [window](#) (and **Receipt ⇒ Gift in Kind Receipts ⇒ Filtered Donors** if you are using [separate Gift in Kind receipts](#)) now allows you to also filter the donations on a range of donations' Dates Received. This could be used to generate receipts for all donations for an event where the donations are all recorded on the same date, if there wasn't already a distinct donation category you could filter on for that. It could also be used to receipt just one receiptable donation for a donor with multiple unreceipted donations, as long as you also enter a donor criterion to restrict the receipts to that one donor. It could also, of course, be used for an actual range of dates (not just one date).



- You can now give your own names to the Donor Category 1 and Category 2 fields, in the **Maintenance** ⇒ **Main Window Options** [window](#). Doing so also changes the names of relevant menu options, text on reports, etc.
- In the **Database** ⇒ **Import** ⇒ **Donors** [window](#) and the **Database** ⇒ **Import** ⇒ **Donations** [window](#), the option to not review the data to be imported before completing the import has been removed. Now you will always be shown the window on which you can review that data.
- In the **Database** ⇒ **Import** ⇒ **Donors** [window](#), you are now warned if it appears that donors to be added have the same names as existing donors, which could mean that the import would create duplicate donors.
- Fixed a bug in the new checkbox for "Allow updating existing donors, matching on the Member/Envelope Number" in the **Database** ⇒ **Import** ⇒ **Donors** [window](#). When you were updating existing rows, it could fail with a techie error about a violation of a foreign key constraint, when trying to delete a row from the DONOR table that had donations. (The import feature doesn't ever actually delete any rows, but it was trying to update an existing row by deleting it then re-inserting it.)

### Version 3.80 (April 20, 2016):

- The **Database** ⇒ **Import** ⇒ **Donors** [window](#) now has a new checkbox for "Allow updating existing donors, matching on the Member/Envelope Number".
- In the **Maintenance** ⇒ **Receipt Options** [window](#), you can now choose to include both the Cheque Number and the Description in the Details Table for the built-in (non-mail-merge) receipts. You could always do that for mail-merge receipts. Previously you could only choose to include one or the other for the built-in receipts. The default is still to include neither.
- There is a new option on the [Donations](#) tab of **Maintenance** ⇒ **Main Window Options**, "Allow Negative Amounts". Although for issues like cheques that have been entered into DONATION then come back NSF we recommend just deleting that donation, some users prefer to enter a separate "donation" that has a negative Amount, to reverse the original donation. Checking this new checkbox allows for that.
- Fixed a bug that did not allow an [Eligible Amount](#) of a donation to be \$0 if you had not checked the "Allow \$0" checkbox on the Donations tab of **Maintenance** ⇒ **Main Window Options**.
- If you select the [pledge type](#) "Annual with Start Date and Category", there is a new Pledge information letters [mail-merge field](#): «DetailsTableAllCategories:...». Unlike «DetailsTable:...» for such pledge letters, which only lists donations towards the pledge, the new field lists all donations in the current year, whether or not they are toward the pledge.
- If you select the [pledge type](#) "Multiple Year", there was a bug when editing Pledge information mail-merge letters: if you inserted the field «DetailsTableAllYears:...» with the **Insert** button, it should have prompted you for which Donation fields to include, but it didn't. That has now been fixed.
- When you are creating a [bank deposit](#), if you have donations with an eligible amount different from the total amount ([split receipting](#)) you can no longer set the Bank Account and the Advantage Account to be the same account name, which would have been an error. The Advantage Account must be an income account in your accounting program.
- In [Custom Reports](#), you were not supposed to be able to select both a regular amount field (Total Amount or Eligible Amount) and a summary field (a Sum or count), because that really doesn't make any sense, but it was not preventing that as it should.
- Also in Custom Reports, you can no longer select both the Donor Comments field and a summary field (a Sum or count) because that generated SQL that would not work.

- If you start by installing the free feature-limited [Lite version](#), then install one of the full-featured versions (Standalone, Network Server or Network Client) on top of that, previously your 60-day evaluation period would count as starting when you installed the Lite version, and thus the evaluation period might already be over. (In that case you would have to get an evaluation extension to continue evaluating that full version, unless you paid immediately.) Now doing this upgrade restarts your evaluation period. In the unusual case where you had previously had a paid licensed copy of a full version, switched to Lite, and then switched back to a paid version, this will also remove your saved license key from the licensing file, so you will have to reinstall the key (if you still have it and it is up to date) or re-request it (if your payments are up to date).

#### **Version 3.79c (March 22, 2016):**

- In the **Maintenance ⇒ Paid By Values** [window](#), there is an obscure way to cause it to have two rows with "Cheque" or "Check" in them, which should not be allowed, and prevents you from making any other changes. Now if that is the case, when you close that window, it will detect the problem and delete the duplicate row.

#### **Version 3.79b (March 22, 2016):**

- If you enter an incorrect password in the program (such as a [Program Entry](#) password), the message you get now includes the Organization Name from the database you are trying to access. That can be helpful if you have [multiple databases](#), and might be putting in a password for the wrong one. It's also helpful if you forget your password and we have to give you a temporary one to get in, because it is based on the exact Organization Name, which you can then tell us.
- Fixed a bug introduced by version 3.79, if you are trying to install an [evaluation extension](#): the program exits, after giving a message "Internal error: licensing object not passed when opening w\_new\_eval\_date".

#### **Version 3.79 (March 14, 2016):**

- Changed the **Maintenance ⇒ Receipt Options** [window](#), to separate out checkboxes for including the Details Table and Summary Table for the built-in (not mail-merge) receipts. This allows you to omit both of them. This may allow built-in receipts with the **Receipt Style / Location** of "Quebec (French only)" to fit on one page, when they otherwise went to two pages. Unfortunately receipts for "Quebec (bilingual French and English)" still print a blank page even if you omit both tables, a bug which we have not been able to eliminate so far.
- Fixed a bug where when you printed sample mail-merge receipts (or saved them to PDF, or emailed them) created with **Receipt ⇒ Current Donor Sample**: the "SAMPLE ONLY" watermark might not appear. (This was supposedly previously fixed in version 3.73d, but I think the fix only worked with older versions of Internet Explorer.)
- Fixed another bug with the built-in (not mail-merge) sample receipts, where if you emailed them with the **Email/Print** button (which for sample receipts always goes only to yourself, for testing), the Details Table and Summary Table disappeared in the emailed PDF file (and on-screen, after the emailing).
- Users have been having trouble configuring email sending with Gmail in the **Maintenance ⇒ Email Sending Configuration** [window](#). There are now two different solutions available in the program for that. Details are in the Help page [Gmail Configuration](#).

- In the first **Maintenance** ⇒ **Email Sending Configuration** [window](#), made the figuring out of the settings from an account in Microsoft Outlook work for newer versions of Outlook (Office 2016 and 2015). Also included details so it could directly figure out settings for @me.com addresses.
- Added **Reports** ⇒ **Donor** ⇒ **Duplicate Member/Envelope Numbers** for finding donors in the same year with the same member / envelope number, which should not normally be able to happen, but could occasionally happen, most commonly by using the **Database** ⇒ **Copy Missing Donors** [menu option](#).
- Found the places in the program that would allow duplicate member/envelope numbers to be added, and changed all of them to either report on it after the fact, or prevent if appropriate.
- Fixed a bug when using the **Lowest Unused Member/Env. #** option to assign a number to a donor, where if there were donors with duplicate member/envelope numbers, it could try to give the first duplicated number to yet another donor!
- Fixed a problem in the date formatting for receipts. It was supposed to use the format "d mmm yyyy" either if the long date format in Control Panel started with a code for the day number, or if your Receipt Style / Location was one for Quebec, and the format "mmm d, yyyy" otherwise. Now it does.
- Added a new Receipt Style / Location option, New Zealand, in the **Maintenance** ⇒ **Receipt Options** [window](#). There are new customized built-in and mail merge receipts for New Zealand. If you were previously using the Receipt Style / Location "Other", and had customized the Other mail-merge receipt for your use, it will be copied to become a customized New Zealand receipt for you to use.
- The built-in receipts for Canada (English), both types of Australia, New Zealand, and Other, should all fit in #10 window envelopes now, as long as there are no separate lines shown for the total amount and eligible amount ([split receipting](#)). Unfortunately the same change could not easily be made for the mail-merge version of the receipts - we recommend that you continue using [Receipt Mailing Labels](#) if you are using them.
- For mail merge receipts with a «[DetailsTable](#):...» field (and other mail merge letters that can include that field), if ";2column" is included to cause it to have two columns of donations across the page in the table, but there is only one donation to be included in the table, then only one set of column headers is now displayed in the table. Previously two sets of column headers were displayed even when there was only one included donation.
- There are two new receipt [mail merge fields](#), for Receipt Style / Location options that allow for [fiscal year receipting](#) and data entry: «Fiscal» and «YearOrYearEnd».
- Those two new fields are used to change the wording for such Receipt Style / Locations to say that the receipt is for the year ending on the fiscal year end, when you have changed the current year to use fiscal year receipting. The same wording changes were made on the built-in receipts for those locations.
- Clarified in the Help for [Batch Entry](#) that even if you check "Include existing donations for the specified date", donations that have already been receipted are not displayed. That is because receipted donations cannot be edited, and the only reason to bring them back up on this window would be to edit them. If you just want to see them again, use a report, such as one of the **Reports** ⇒ **One Date Donation** [reports](#).
- Added some improvements to how the program figures out how to launch Microsoft Word or Excel, for some users where those Microsoft programs were present on the system but not being found by DONATION.
- Fixed a harmless bug where after certain types of actions you could get a "Null object reference in nvo\_receipt" message when exiting the program.
- Eliminated a techie error message (which doesn't actually harm anything) when you try to [Memorize](#) a report with no title or subtitle, like mailing labels or envelopes.

- Some aspects of the program code have been significantly re-organized to allow us to share more code between this program and our ACCOUNTS bookkeeping program.
- Fixed a bug where errors communicating with the Software4Nonprofits.com website, like when using the **Tools** ⇒ **Check for Updates** [menu option](#), could cause the program to crash with a techie error message about nvo\_http.

#### **Version 3.78b (February 22, 2016):**

- Fixed a problem some users were having with emailing where they got messages saying it failed when it shouldn't have, particularly with messages about components not being unlocked.

#### **Version 3.78 (February 2, 2016):**

- Fixed a bug introduced in version 3.77, where Canadian English or Quebec French or Bilingual mail-merge Gift in Kind receipts were failing with an error message about incorrect SQL. Regular (non-mail-merge) Gift in Kind receipts, and non-Gift in Kind receipts, and receipts for any other location (like U.S.A.) were not affected by this bug.
- Added a section on Specific Gmail Problems to the Help page on the **Maintenance** ⇒ **Email Sending Configuration** [menu option](#), because a lot of users are having problems with that when their email address are Gmail addresses.
- Made some improvements to the messaging for the unusual cases where there is something wrong with the program's licensing file, to allow you to better understand what is wrong and what to do about it. If it is necessary to re-download and install the program the fix such problems, the program will give you an option to go to the DOWNLOAD page on the website to do that.
- The program now comes with a newer composite version of the 3rd-party controls that used to be separated, for sending emails (Chilkat Mail), for communication with websites (Chilkat Http) and for extracting files from compressed files (Chilkat Zip).
- Fixed a problem where users with Microsoft Excel version 16 might not be able to get it to open files from the program, for instance from the [Save As](#) button for reports.
- When uploading [Internet Backups](#) to the server (as part of making regular backups, or when you exit the program as part of the [Cloud Storage Service](#)) the progress indicator is now reasonably accurate. (Previously it just went across the screen once or more, but didn't correctly indicate the percentage of the upload that was done.)

#### **Version 3.77 (January 27, 2016):**

- Introduced an option for [Using Fiscal Year Data Entry and Receipting](#), for users in countries like Australia, New Zealand and the United Kingdom, where the tax receipting year is not the calendar year. It's turned on by a new checkbox in the **Maintenance** ⇒ **Organization Info** [window](#).
- Renamed the "Receipt Style For" field, found both in **Maintenance** ⇒ **Organization Info** and in **Maintenance** ⇒ **Receipt Options**, to "Receipt Style / Location", for clarity.
- In many places in the program, if you entered data in a field that was not allowed, the error message about that would come up in a message box using a very small font, with the title "Data Entry Error". Now most of those messages use our normal larger font message boxes.
- Fixed a bug when [creating bank deposits](#), where if you have used a bank account name that included double quotation marks, the program crashes when you enter the window for

creating another bank deposit. The same problem may have also applied to other fields, like the Advantage Account.

- Fixed a bug in the **Maintenance** ⇒ **Change Year** [window](#), where if you select a new year that doesn't yet exist in the database, answer No when prompted to confirm changing to it, and then just close the window by pressing **ESC** or clicking **Cancel**, you are still prompted about creating the new year.

### **Version 3.76 (January 16, 2016):**

- Added a **Letters** ⇒ **Email Newsletters** [menu option](#) that allows you to send an email to all or filtered donors with email addresses, with an attachment.
- Corrected an inconsistency in receipts for Canada (English) where the displayed Donation Date (for receipts containing only one donation) was in a different format from the receipt date.
- The **Maintenance** ⇒ **Receipt Options** [window](#) has been slightly re-arranged, and has a new option that only applies to mail-merge receipts and letters: "Use Windows short dates for Details sections". This is mostly intended for users in countries using languages other than English or French, and applies to both the table of donation details and the DonationDateOrYr field, when the receipt is only for a single donation.
- The **Receipt Options** window also now allows editing of the Receipting Person (the name of the person who signs the receipts), which can still also be edited in the **Maintenance** ⇒ **Organization Info** [window](#) (where it could always be edited before). This should make this field easier to find.
- Renamed **File** ⇒ **New Member/Env. #** and the corresponding popup menu on the "Member/Env. #" Donor Details field to **Next Higher Member/Env. #**, and added **File** ⇒ **Lowest Unused Member/Env. #**, which automatically fills in that field with the number that is the first gap in the sequential numbering (or 1 if that hasn't yet been assigned to any donor).
- On the Donor tab of the **Maintenance** ⇒ **Main Window Options** [window](#), added a field for "Lowest Member/Env. # for automatic assignment", that applies to the menu options in the previous point, and is also used as the default starting point for a new "Starting Env. # for assignment" field on the **Database** ⇒ **Reassign Envelope Numbers** [window](#).
- Added a "magic" [mail-merge field](#) MultipleDonations for use in receipts, that can be used in sections such as "*«if:MultipleDonations»text related to multiple donations«else»text related to single donations«endif»*" to include variable text based on how many donations are included in each receipt.

### **Version 3.75b (January 2, 2016):**

- When you [switched to a new year](#) for the first time, it was supposed to ask you whether to skip copying donors who didn't have any donations in the last 2 years, but it was not doing that, so it always copied all donors from the previous year. That is now fixed, and the question is being asked again.

### **Version 3.75 (December 31, 2015):**

- The [Cloud Storage Service](#) is now available, which is an improved way for users with DONATION on multiple computers (not on a local network) to [transfer their data between computers](#), using [Internet backups](#), but without having to worry about whose turn it is to have control of the database, because it takes care of that for you.



- In the **Database** ⇒ **Switch Databases** [window](#), if you choose a different database in the Current column of checkboxes, the default button now becomes the **Switch** button, so you can just press **Enter** to do the switch rather than having to click on it.
- Added comments at various places in this Help file explaining that you should **not** try to move your database to a 3rd-party cloud storage location like Dropbox, Google Drive, Microsoft OneDrive etc.
- You can now force languages other than English and French to be used in the headings of the «DetailsTable», «DetailsTableAllYears» and «SummaryTable» [mail-merge fields](#) in [mail-merge receipts](#) or letters, by adding lines with the correct wording into the DONATION.INI file in the program's Data Directory.
- Fixed a bug: If you do **Reports** ⇒ **Bank Deposit** ⇒ **One Deposit Details** (or the same report from **Reports** ⇒ **Report Browser**) when there have not yet been any bank deposits in the current year, it first tells you that there are no bank deposits and then when you click **OK** to that message, the program crashes with a further error message.
- Fixed a bug: If a donor has a business name with a comma in it, like "Smith, Jones and Company" then the heading for the donation details area on the main window becomes reversed (as if it was a person's name), so for instance this example would be displayed as "Jones and Company Smith".
- Fixed another bug: If a donor category field is empty, you change it to "<Add New>", then don't add anything in the popup window and close that window, the category value stays showing "<Add New>". If you then **Save**, you get a techie error message and you cannot save. The fix is that when you do that, the category now automatically reverts back to the blank (empty) one.
- In both the French and Bilingual Quebec built-in version of the receipts, make the amount move up on the 2nd copy (the one for the provincial tax form) if it's not "split receipting" (no need for lines about the total amount, advantage, and eligible amount). That makes the two copies look more identical.

#### **Version 3.74b (December 3, 2015):**

- Fixed Total Donations information mail-merge letters: the «TotalAmount» and other totals fields were wrong (way too high) in the merged letters, for any donors with previous year donations, because of incorrect SQL used to add the «LastYearAmount» field in version 3.74.

#### **Version 3.74 (November 20, 2015):**

- For [mail-merge letters](#) created with **Letters** ⇒ **One Letter** or **Letters** ⇒ **Mass Mailing**, added a «LastYearAmount» [field](#) to Donor Information and Donation Totals Information letters.
- Also, in the Donor Information, Current Donation (or Individual Donations) Information and Donation Totals Information letters, if there was no pledge for a donor, the «Pledge» field in a merged letter was empty, fixed that to display \$0.
- Changed **Tools** ⇒ **Register Online**, and the Register page on the website, so that the field for the organization's website address allows up to 70 characters (previously 50).
- Provided an option in the **Maintenance** ⇒ **Configure Bank Deposits** [window](#), for QuickBooks users to change the date format in the export files from MM/DD/YYYY to DD/MM/YYYY, if they are having problems with importing those dates into QuickBooks on a computer with a Short Date Format like DD/MM/YYYY.



**Version 3.73e (October 21, 2015):**

- Fixed a bug where if you try to install an expired license key, the error message you get states an incorrect date as being the expiry date of that license key.

**Version 3.73d (October 19, 2015):**

- In the mail merge [editor](#), added an **Actions** ⇒ **Zoom** menu option, which actually just puts up a message box telling you how to zoom with keyboard or mouse actions.
- Added a [Glossary](#) page to this Help file.
- Fixed a bug in **Letters** ⇒ **One Letter** or **Mass Mailing**, where if you **Show Advanced Actions** and then **Edit Copy**, you can get an error message "Error re-retrieving drop-down list of Letters to include new copy."
- Fixed a bug when using **Receipt** ⇒ **Current Donor Sample** if you have chosen to use [mail merge receipts](#): the "SAMPLE ONLY" watermark was not necessarily showing up.
- Corrected the [description](#) in this Help file of **Reports** ⇒ **Fiscal Year** ⇒ **Donor Totals, Sort by Name** to no longer incorrectly say that it reports on two fiscal years. It only reports on the current fiscal year, like all other Fiscal Year reports. Also corrected this in the description in the Report Browser.
- Added some logging on successful email sends from the program, to help us be able to debug extremely rare problems reported by users where the program says an email was sent successfully, but nothing is ever received. (The log is in the file mailLog.txt in the program's Data Directory.) Also changed the logging on email sending errors from being an XML file to be a plain text file, which is easier to read.
- Fixed an obscure bug in the [Reports window](#). If you had put on a [Filter](#), then removed that Filter, then clicked the **Rerun** button and re-run the report, you got an inappropriate couple of messages about something being invalid and having to re-save the memorized report. (And it wasn't even a memorized report in the first place!)
- Fixed a very unusual potential problem where in the **Database** ⇒ **SQL Select** [window](#), if you are given a password by Software4Nonprofits to allow you to do some form of data updating in that window, that password could fail to work because it had an unprintable character in it.
- Fixed a small weirdness in the **Maintenance** ⇒ **Create Bank Deposit** [window](#), where if you retrieve an existing deposit, and it doesn't include any donations with an advantage (see [Split Receipting](#)), the **Delete Deposit** button that appears is in the wrong position (too low, partly overlaying the list of included donations).
- The program will refuse to create mail merge letters or receipts, or to do several other functions, if the Windows Control Panel's long date format gives dates that are longer than 20 characters, because for technical reasons this causes problems. Previously the program only told you about that, and gave a longish message saying how to fix that format. Now it gives you an option for the program to try to fix it for you.

**Version 3.73c (September 21, 2015):**

- Added a new Help topic [Titles in Donor Names](#), explaining why there is no separate field for titles in the Donor Details area, and some ways to work around that if you do want to record them.
- Hid a few Reports menu options for [limited users](#), that were accidentally shown.
- Improved the clarity of messages you can receive if you run a [Network Version](#) of DONATION but only have a license key for the Standalone version. Previously those

messages referred to the fact that you were using the Firebird Server, which most users wouldn't understand - now it just refers to the Network Version of the program.

#### **Version 3.73b (August 4, 2015):**

- Added the ability to have two bank deposits to the same bank account on the same date, through a [trick](#).
- Added an option to [delete](#) an existing bank deposit after retrieving it.
- Receipts for [Quebec](#) that use French dates have a new date format for the receipt date, composed of the day number, a 3-5 letter abbreviation for the month, and the year. For instance, "31 juill. 2015" for July 31, 2015.

#### **Version 3.73 (June 24, 2015):**

- Made a fix in the installation program so it will work on the upcoming Microsoft Windows version 10.
- In the **Backup/Restore** ⇒ **Backup Frequency and Options** [window](#), added an option for you to be reminded to backup the program every time you exit it.
- In the **Reports** ⇒ **Custom Reports** [window](#), there are two new fields you can select in the Donation fields list: Month # Received and Quarter # Received.
- Also in **Reports** ⇒ **Custom Reports**, if you select the # Donations field, and a range of years, and Separate Totals, there will be one # Donations field column for each year in the report, as was previously done for the Sum(Total Amount) and Sum(Eligible Amount) fields.
- In **Reports** ⇒ **Bank Deposit** ⇒ **One Deposit Details**, fix a tiny bug: the bank name could be cut off in the header of the report if it was at all long.
- Fixed a very unusual problem when you are updating from a version prior to 3.72, where if you had two bank deposits done on the same date but as part of different years' data (such as in early January of some year), a database conversion step as part of that upgrade failed.
- In the **Database** ⇒ **SQL Select** window, more types of SQL statements (beyond the normal SELECT statement) are now allowed, with the provision of a SQL updating password from Software4Nonprofits, than were previously allowed. This will allow our support people to fix certain types of rare problems in users' databases without having to have those databases sent to us by email backup, fixed here, and sent back for restoring.
- Fixed a problem where certain complex numeric expressions (that aren't for currency amounts) get formatted as currency when they shouldn't, in **Database** ⇒ **SQL Select**.

#### **Version 3.72b (June 1, 2015):**

- Fixed a rare but bad bug in [emailing receipts, letters or statements](#): If you were using mail-merge receipts or letters, and you edited the merged documents, and they were for more than one donor, and then you chose to email them, you would be prompted for whether to save the edited changes before continuing. If you answered Yes, the documents for all donors would be included in the PDF attachment to the first donor receiving an email (a bad privacy violation!). Fortunately this had only happened to one user, to the best of our knowledge, because it's a fairly unusual combination of steps! (This could also happen with unusual merge documents even if you didn't edit the merged documents before trying to email them - that is also prevented by this fix.)

#### **Version 3.72 (May 25, 2015):**

- All backup filenames now have a time component as well as a date component, such as DONATION-YYYY-MM-DD.HH.MM.SS.DB.GBK, where YYYY-MM-DD is the date the backup was made, and HH.MM.SS is the time.
- There was a weakness in the handling of [bank deposits](#), in that you couldn't have deposits to two different banks on the same date, and when doing reports on old bank deposits with **Reports ⇒ Bank Deposit ⇒ One Deposit Details**, it always showed them as being done on the bank that you last did a bank deposit on. That has been fixed for bank deposits recorded after installing this version. (Reports on bank deposits made before installing this version will still all show up as being on the last-used bank before this upgrade.)
- When you start DONATION with an empty database (on a first install, or re-install on a new or rebuilt computer) the DONATION Initial Startup [window](#) now has an additional option to restore from an Internet backup, if you have one, and know your Unique ID for Internet Backups and the Backup Encryption Password you were using for such backups. (This change actually appeared in version 3.71c, but we forgot to note that fact at the time.)
- On the **Reports ⇒ Donor** sub-menu, the report options **Mailing Labels**, **Mailing Labels with Member/Envelope #** and **Envelopes** all now have a new option to print only for the currently selected donor on the main window.
- Fixed a minor bug: the paging buttons in the Reports viewing window were being disabled for **Reports ⇒ Donation ⇒ Details**, **One Page per Donor**, and **Reports ⇒ Donation ⇒ Category Totals**, **One Page per Donor**, when there really were multiple pages. Now they are enabled in that case.
- In the Help topic for [Finding a Donor](#), clarified that accented characters cannot be found by the normal method of just typing in the Donor List. Instead you have to use the **Ctrl+F** Find Donor window to do that.
- Fixed a bug when doing **Receipt ⇒ Duplicate/Corrected by Number**, where if all of the donations included in that receipt had been deleted, so it should have been reprinted with a new amount of \$0, the program could crash.

#### Version 3.71c (May 4, 2015):

- Fixed a bug introduced in version 3.71 - if you were registering for the first time with **Tools ⇒ Register Online**, and you hadn't previously set up an email address with **Maintenance ⇒ Email Sending Configuration**, the email address field would be both empty and uneditable, and you would not be able to submit the registration because the program would ask you to enter an email address!

#### Version 3.71b (April 27, 2015):

- Fix a bug added recently: If you are using the evaluation version, and from the Evaluation and Licensing window that comes up when you start the program, you click "Request License Key" or "Request Key for Extension of Evaluation Period", the program crashes with an error message. (Those both still worked if you went into the program with the **Continue** button, and called up that window from the **Tools ⇒ Request or Install License Key** menu option.)
- Some improvements to the messaging if you try to do a backup or restore on a drive letter that is not available (e.g. a USB memory key). Also improvements to various other bits of messaging in the program.

#### Version 3.71 (April 20, 2015):

- Added a **Copy Prev** button to the **One Date Batch Entry** [window](#). For donors who give the same amount each time they donate, that allows you to quickly copy in that amount (including for donations split between multiple donation categories) as the current date's donation.
- Also on the **One Date Batch Entry** [window](#), changed the hotkey for **Split All** from Alt+T (which didn't work, because it was already the hotkey for the **Totals by Category** button) to Alt+P.
- Added a **Database** ⇒ **Import** ⇒ **From Geminon** [menu option](#), for importing data directly from a Geminon database file. (Geminon is a Canadian church software program that went out of business several years ago and is no longer supported.)
- Added a menu option **Maintenance** ⇒ **Change Password** ⇒ **Read Only Password**, that allows you to set a [Read Only Password](#). Entering DONATION with that password means you can view data and reports, and create letters etc., but not change any data, generate receipts (other than sample ones) etc.
- The top sub-report in **Reports** ⇒ **Bank Deposit** ⇒ **One Deposit Details**, showing the details, had somehow become too narrow, causing longer values in the Cheque # / Paid By field to be cut off. Made it the proper width again so that would not happen.
- Fixed some problems that can happen in the installation program if you are installing into a non-standard location for the program files, or re-installing to one location when a prior install went to a different location.

#### **Version 3.70b (March 6, 2015):**

- Fixed a bug where if you move or resize the main window after it opens, and then do something that causes the data in the main window to be re-retrieved (like changing the working year, or restoring a backup) the window goes back to the position and size it was when it first opened.

#### **Version 3.70 (February 26, 2015):**

- When you are [emailing receipts, letters or statements](#) (but only mail-merge receipts, not the regular built-in ones), or [emailing newsletters](#), you now have the option of inserting merge fields into the Subject line and text Body of the emails, as well as in the merged document (for receipts, letters and statements) that is being attached as a PDF. That lets you personalize those emails.
- Also when you are [emailing receipts, letters or statements](#), or [emailing newsletters](#), you can send the Body of the email as HTML, if you are very familiar with it, by having "<html>" (without the quotes) as the very first thing in the Body, and ending it with "</html>". Of course, other appropriate changes have to be made to make it valid HTML that will display well! HTML body text can be viewed in a web browser with a new **Show in Web Browser** button that appears if the body starts with "<html>".
- In the [mail-merge editor](#), the default template documents installed by the program now show thin grey dotted borders around all table cells, to help you see how the document is structured and assist in any editing you do. Those borders disappear when you print the merged document, save it to PDF, or email it - they are only visible on the screen. For existing edited documents where those borders are not shown, they can be added with a new menu option **Edit** ⇒ **Show Table Borders on Screen**.
- Fix a bug where if a mail-merge template document is over 32K in size, any merge codes after that point are ignored when you do the merge.

- For reports that prompt for something (like a date, or range of dates) added a **Rerun** button to the [report-viewing window](#), that lets you respecify those prompted-for values, and redisplay the report with your new values.
- Made the report viewing window resizable.
- For Canadian (English, French only and bilingual) [corrected or duplicate](#)/replacement receipts, that create a new receipt with a new number and reprint the existing one with a \$0 amount, the new receipt is now displayed first, before the reprinted replaced original. That should avoid some confusion.
- If you were [correcting or replacing a receipt](#) for Canada, and you told it not to change the receipt status, and you had changed the number of donations included in the receipt from one to more than one or vice versa, there was a bug. The bug was that it didn't change the wording "Date of donation: [date]" to "Year of donations: [year]" or vice versa as the number of included donations changed. ("Date of donation" is only supposed to be used when exactly one donation is included in the receipt.)
- In **Reports ⇒ Donor ⇒ Addresses** and **Address by Member/Envelope Number**, added the email address to the report.
- Added **Reports ⇒ Donor ⇒ Contact Information**, that shows the name, phone number and email address for each donor, or each donor with donations within a specified range of dates.
- Fixed a bug: The French-only built-in receipts had a number printing at the top right of the page that did not belong there.
- Fixed a bug in the Bank Deposit details report (available from the **Maintenance ⇒ Create Bank Deposits window**, or via **Reports ⇒ Bank Deposit ⇒ One Deposit Details**). The bug was that the Summary by Paid By sub-report within the report could include amounts for donations that should have been excluded, because their donation category had no configured matching accounting account.
- Fixed a subtle bug that appeared in three reports under **Reports ⇒ Donor: Mailing Labels, Mailing Labels with Member/Envelope #, and Envelopes**. The bug was that they had an invisible field `total_amount`, which could be filtered on or exported, which was always the total donations for that donor in the current year. It should have been the total donations within the selected range of dates, if you chose to only generate labels or envelopes for donors with donations within a selected range of dates. That has been corrected.
- Added a **Save SQL** button to the reports-viewing window, which can be used in the process of [Loading and Saving SQL for Reports](#).
- Fixed a problem introduced by version 3.69b, where if the program tries to send an email and is unsuccessful, if it offers to show you a log with the error, that log may not be informative (because it was actually the log of the wrong action).
- Fixed an inconsistency between the program itself and the installation program about how they find the program's Data Directory - a couple of users were finding that the different methods used, which we thought always gave the same answer, did not do so.
- Improved the wording in the Evaluation and Licensing window (accessed via **Tools ⇒ Request or Install License Key**) when you are already licensed. If it tells you that your eligibility for support and upgrades has expired, and you need to pay to renew that, it makes it clear that this is "according to your most recently installed license key", which may or may not be correct. (You might have paid more recently, but just not requested, received and installed an updated license key yet.)
- Fixed a bug in **Letters ⇒ Email Newsletters**, where the program would crash after a successful set of emails, if you answered "Yes" when it reported on how many emails it sent and asked you whether to close that window now.
- In the One Date Batch Entry [window](#), in the Category drop-down, moved "<Add New>" to be above the empty row, so if you have no default 2nd or 3rd donation categories set in the



Options window for batch entry, you use **Split Donor**, and you try to use the down arrow on your keyboard to move to your desired category, it doesn't immediately find "<Add New>" and pop up the window for adding a donation category. (Selecting categories by their first letter is faster anyways: see [Keyboard Shortcuts](#).)

- Added some content to the Help page on the [Data Directory](#), to avoid possible confusions about the Data Directory itself versus its Data subdirectory, and about the "Documents" versus "Public Documents" subdirectory under C:\Users\Public in recent versions of Windows.
- Hopefully fixed a problem that occurred very occasionally (we believe on 64-bit computers) when the installation program tried to install the novaPDF PDF printer, and it would not install, giving the message "Error 1 installing novaPDF".
- Fixed a bug that only occurred on a few reports where the VCR-style paging controls could be disabled on multiple-page reports. (They are only supposed to be disabled on reports that are only one page long.)
- Enhanced an error message for a rare situation where the novaPDF printer can't write to its settings file, to explain how to resolve the problem.

#### **Version 3.69b (January 31, 2015):**

- In the internal [mail-merge editor](#), split the **Insert ⇒ Page Break** menu option into three sub-menu options under that: **At Start of Document**, **At Current Cursor Position**, and **At End of Document**. This was done because in some mail-merge documents, particularly receipts, inserting the cursor at the apparent start or end of the document and using the existing **Insert ⇒ Page Break** menu option didn't always work properly at all.
- Improved the messages you receive if the program tries to send an email and is unsuccessful, to be clearer and more helpful about what the problem likely is, and how to fix it. (This applies whether you are doing so from the **Test** button in the **Maintenance ⇒ Email Sending Configuration** [window](#), or trying to actually email a letter, receipt, report or database backup.)

#### **Version 3.69 (January 26, 2015):**

- Made a number of improvements to the **File ⇒ One Date Donation Entry** (Batch Entry) [window](#):
  - The Options window has new drop-down lists for **First split donor category** and **Second split donor category**, that control the donation categories for rows for donors added by the **Split Donor** button.
  - There is a new **Split All** button on the actual data entry window, that brings up a prompt to select a donation category, and then adds one row for each displayed donor, with an empty Amount and the selected Category.
  - The **Add Donor** [button](#) now works, bringing up a window on which you can add a new donor and then continue entering the batch of donations.
  - All controls on the Options window now have accelerators (underlined letters, so you can select that control with **Alt** plus that letter).
- Added a note in the Help topic [Non-Receiptable Donors and Donations](#) to clarify that the codes that can make donors and donations not be included in receipts are case-sensitive, so for instance while "Non-Receiptable" works, "Non-receiptable" or "non-receiptable" would not work.
- In the Help topic [Pledges in Donation](#), added a new sub-section on "Entry of Donations towards Pledges" to clarify that aspect.



**Version 3.68b (January 19, 2015):**

- Added the ability to specify a range of dates to report on in **Reports** ⇒ **Donation** ⇒ **Summary by Date and Category**.
- Made an improvement in **Reports** ⇒ **Donation** ⇒ **Summary by Dollar Ranges** so that adding a Filter doesn't run the risk of breaking the report by making the dollar ranges get out of order and sometimes be duplicated.
- With the new ability to configure an [alternate HTML editor](#), with some external editors the file format could be somewhat damaged, causing merges to not work properly, if you returned to the built-in editor after saving changes in the external editor, and then did not make any further changes in the internal editor and save them. That has been fixed.
- The program was making a check on startup that it could find a unique identifier for your computer, and giving a message to you if it could not do so. (This was going to be needed for an upcoming feature.) A few users were getting that message, so some additional code was added to find other sorts of unique identifiers if the original version wasn't working.

**Version 3.68 (January 13, 2015):**

- The built-in and template mail-merge receipts for the U.S.A., and the built-in receipt for English Canada, were all re-arranged to make them fit better into standard #10 single-window envelopes. (The template mail-merge receipt for English Canada already seemed to be fine.)
- Added a section to the Help page on [Emailing Newsletters](#) about handling unsubscribes. Also added a sentence that mentions unsubscribing, to the default text body to be sent with the email newsletter, which you are prompted with as a suggested starting point the first time you send one.
- In the [mail-merge editor](#), when you use the menu options **Insert** ⇒ **Logo Image** or **Insert** ⇒ **Signature Image**, if they are a multiple of the standard suggested sizes, the program now gives you an option, to choose between inserting them at their actual size, or scaling them down to that standard suggested size.
- All signatures embedded in the template mail-merge receipts and other letters installed by DONATION are now sized to the official size for the signature image, 166 x 39 pixels.
- Changed the way logo and signature images are inserted into the HTML of mail-merge letters and receipts to be more proper modern HTML, so that they would work better in some external HTML editors.
- Added a new **Actions** ⇒ **Configure Alternate HTML Editor** [menu option](#) in the [internal editor](#) for mail-merge letters and receipts, that allows you to configure another external editor to be used. Doing that configuration causes a new **Actions** menu option and toolbar item to appear, for editing with that editor.
- In the Help section on the [Details Table](#) in the Help page on Mail Merge Fields, added a sub-section "Changing the Font Size for the Details and Summary Tables", because obvious ways of doing that do not work, so you need detailed instructions if you need to do so.
- Fixed a small problem where some of the mail-merge template files installed with the program could come up incorrectly in certain external editors due to an incorrect character set code.

## 26.3 Revision History 2011 to 2014

See Also: [Revision History - Latest Version](#), [Revision History 2015 to 2018](#), [Revision History 2007 to 2010](#), [Revision History - Earlier Versions](#)

### Version 3.67c (December 27, 2014):

- Fixed a minor problem in the installation program, when it was being used to update a version prior to 3.66, it gave a long message that was all one long paragraph, rather than being nicely formatted.

### Version 3.67b (December 26, 2014):

- Fixed a problem where if you used the **Database ⇒ Delete All Data** [menu option](#), it didn't reload your mail-merge letters and receipts (and any memorized reports) back into the database afterwards, so you got error messages if you tried to use them. Also fixed any other situations where the mail-merge letters and receipts were missing from the database.

### Version 3.67 (December 22, 2014):

- Added the new **Letters ⇒ Email Newsletters** [menu option](#), for emailing a fixed PDF file (usually a newsletter) to all donors, with an option for filtering the donors to select which ones it goes to.
- In the **Reports ⇒ Donor ⇒ Mailing Labels**, **Reports ⇒ Donor ⇒ Mailing Labels with Member/Envelope #** and **Reports ⇒ Donor ⇒ Envelopes** [mailing label](#) and [envelope](#) reports, added a checkbox for "Skip donors with email addresses". This allows you to mail out newsletters by postal mail to those donors to whom you could not email them with **Letters ⇒ Email Newsletters**, because they have no email address recorded in the program.

### Version 3.66d (December 15, 2014):

- Fixed a bug where **Reports ⇒ Bank Deposit ⇒ One Deposit Details** could sometimes show only the headings but no data for the final part of it, the Transaction for the Accounting Program. Also, redesigned that sub-report for the transaction for the accounting program to be clearer, with separate columns for the deposit amount (the bank account) and the split amounts.
- Fixed a bug for brand-new installations, which also occurred if you created a new empty database with the **Database ⇒ Switch Databases** [menu option](#), where the letters were not imported into the database until you had exited DONATION and then started it once more.

### Version 3.66c (December 11, 2014):

- Fixed a bug in the [mail-merge editor](#) where the **Insert ⇒ Logo Image** and **Insert ⇒ Signature Image** menu options could in some cases end up doing nothing.

### Version 3.66b (December 3, 2014):

- Fixed a bug where trying to email [Gift in Kind](#) receipts for either of the Quebec styles (as set in the **Maintenance ⇒ Receipt Options** [window](#)) caused the program to give an error

message and exit. (This didn't happen with the mail-merge version of the receipts, only regular ones.)

- Made some improvements to the Help page [Move the Program from One Computer to Another](#), relevant to the changes in version 3.66.

### **Version 3.66 (November 30, 2014):**

- [Mail merge](#) letters and receipts are now primarily stored in the database, rather than in separate HTML files on your hard drive, so they no longer have to be backed up and restored separately. The first time this version (or any subsequent version) is run when you have previously been using version 3.65 or earlier, all template letters and receipts are picked up from your hard drive and inserted into the database. If you are using DONATION on multiple computers, this is done on each computer, though only newer documents are updated when a given one is already present in the database. This does also mean that template letters and receipts are specific to each database, if you are [switching databases](#).
- [Memorized reports](#) are now stored in the database, rather than in separate files on your hard drive, so they no longer have to be backed up and restored separately. The first time this version (or any subsequent version) is run when you have previously been using version 3.65 or earlier, all memorized reports are picked up from your hard drive and inserted into the database. If you are using DONATION on multiple computers, this is done on each computer, though only newer reports are updated when a given report is already present in the database. This does also mean that memorized reports are specific to each database, if you are [switching databases](#).
- Some changes in the way the **Letters** ⇒ **One Letter** [window](#) and **Letters** ⇒ **Mass Mailing** [window](#) display, and the **Reports** ⇒ **Memorized Reports** [window](#) displays, were made in association with the above two points.
- In the **Reports** ⇒ **Memorized Reports** [window](#), added a **Delete** button to delete reports that are no longer needed.
- When importing the Donor Category 1 or Category 2 values in the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#), previously the values had to match an existing value that you had entered via the **Maintenance** ⇒ **Donor Category 1** or **Donor Category 2** [menu options](#) respectively, case-sensitive. (So if you had a category value "Member" in the program, and tried to import the value "MEMBER", it would fail, with an error message.) Now that look-up is case-insensitive, so that example would import successfully. In addition, the values to be imported no longer have to already be there - they will be added if necessary.
- The importing of data from [Membership Plus](#) now imports all years of donations in the Membership Plus database, not just the latest two years of data as it previously did.
- Fixed problems in the versions of the template mail-merge receipts distributed with version 3.64 of DONATION, for Canada (English), both regular and for gifts in kind, and in the one for Quebec (bilingual), the gift in kind version only. The problem was that if you edited and saved them, and then did merges with them, some problems would occur, including ending up with "FIELD ENDIF IS MISSING" printed on the receipts.
- Fixed a small bug where the Help buttons in two windows related to [emailing receipts and statements](#) went to the Introduction help page instead of the correct page.
- In the window for reviewing data before either a [mass mailing](#) or import of various types of data, changed the **OK** button to read **Merge** or **Import** as appropriate, for clarity. Also, in that same window, clicking the "X" at the top right of the window or pressing **Alt-F4** to close it, rather than clicking **Merge** or **Import**, now cancels it just like clicking the **Cancel** button. (Previously they did the same thing as the former **OK** button!)

**Version 3.65 (October 9, 2014):**

- Both [Importing Donors](#) and [Importing Donations](#) now allow for importing CSV (comma-separated value) files, in addition to the previously allowed Excel and tab-separated text files.
- In both the **Letters** ⇒ **One Letter** and **Letters** ⇒ **Mass Mailing** [menu options](#), when you use the **Browse** button it now has an option to load Microsoft Word's new .docx file format as well as the older .doc file format.
- The installation program for the [Network Client](#) version now has clearer instructions, and clear error messages for problems, on the screen for specifying the computer name that the Network Server version is running on, and the path to the database file.
- Occasionally the program fails to start because a user has moved either the program's [data directory](#) or the "Cooperstock Software" directory above it. Now the program will give a clearer error message about this problem, with a suggestion of how to fix it. In some cases it may even be able to try to fix it for you.
- When sending [emails](#) from letters, receipts or statements, the plain-text body of the email used to be limited to 1,000 characters. It can now hold up to 10,000 characters. (That is probably much more than anyone would want to use, given that it is plain text - if you want something longer, and more nicely formatted than you can do with this plain text part, put it into the body of your letter or receipt!)

**Version 3.64 (September 11, 2014):**

- All Canadian receipts (English, French only and bilingual) now handle [corrected or duplicate](#)/replacement receipts the way the Canada Revenue Agency prefers, namely by creating a new receipt with a new number, that says it is replacing the old one, and marking the old one as "Cancelled". If you use mail-merge receipts, this is partly done in expanded text for the «ReceiptType» mail-merge field. In the sample Canadian mail-merge receipts supplied with the program, that field has been moved to a location where there is more room for the longer text that is now in it. Existing users, whose mail-merge receipts will not be overwritten by an update, may want to make a similar change themselves. See [Replacement or Correction Receipts for Canada](#) for details of how this change works.
- The **Receipt** ⇒ **Reprint Range** [menu option](#) now has three radio button choices for whether to leave the reprinted receipts' status as is, mark all of them as "Duplicate" (or "Replacement"), or mark all of them as "Corrected". Previously this was done with one checkbox, only allowing the reprinted receipts to have their status left as is, or to all be marked as "Corrected". Also, previously even if you did not select the checkbox to have the receipts' status changed to "Corrected", any receipt whose dollar amount had changed since it was originally saved would still be marked as "Corrected". Now that does not happen, if you choose the radio button for "Leave all receipts as is".
- For Canadian receipts, the **Receipt** ⇒ **Delete Range** [menu option](#) now has some different behaviour when deleting replacement or correction receipts - see that Help topic for details. In brief, deleting a replacement or correction receipt number without deleting the original receipt number more or less removes the fact that you have made the correction or replacement, but leaves the original receipt there.
- All Canadian receipts now show the "Date of donation" in the main section for receipts that only include one donation, and "Year of donations" for receipts that include multiple donations. (The Canada Revenue Agency only absolutely requires the year of donation, which was already implicitly there in the phrase "Official 2014 receipt for income tax purposes" etc., but we get a lot of requests to add the date.) If you use mail-merge receipts, you will have to add this yourself, because existing mail-merge templates are never overwritten by program updates. You can add in the new [mail merge fields](#) yourself in the

[mail-merge editor](#) for the receipts: «DonationDateOrYrPrompt» (for the text "Date of donation" or "Year of donations", or French or bilingual versions) and «DonationDateOrYr» (for the actual date or year value).

- The «ReceiptType» mail-merge field now displays nothing for original receipts. It used to display "ORIGINAL RECEIPT". This now matches the way the built-in receipts always worked - they never displayed that text for original receipts.
- Removed the three variant mail merge receipt templates for Canadian receipts from new installs of the program, named `receipts_merge_canada_simple.htm`, `receipts_merge_french_simple.htm`, and `receipts_merge_bilingual_simple.htm`. They were for use with receipts where there is no "[advantage](#)". Now the standard receipt templates installed with the program automatically accommodate for that situation, by only displaying a row for the eligible amount of the donation.
- Changed **Reports** ⇒ **Receipt** ⇒ **All Receipts** a bit - see the [new description](#).
- In **Reports** ⇒ **Custom Report**, the Type field in the Receipt column now shows short versions of what would be in the new «ReceiptType» mail-merge field as described above.
- Also in **Reports** ⇒ **Custom Report**, the Receipt # field in the Donation and Receipt columns now includes the year number, the same way it is displayed everywhere else. Previously it displayed the receipt number without the year number.
- Renamed the **Receipt** menu option **Duplicate/Corrected Receipt by Number** to the simpler **Duplicate/Corrected by Number**.
- Separated out a full Help page for [Reprinting Receipts](#), which had previously been part of the very long page [Generating Charitable Receipts](#).
- When you use the **Letters** ⇒ **One Letter** or **Letters** ⇒ **Mass Mailing** menu options to [reprint receipts using mail merge](#), it now warns you, and doesn't allow you to generate the letters/receipts, if any of the included receipts are "incorrect". (That happens if you have deleted one or more of the donations that were originally included in the receipts, for instance because they were NSF or needed a correction.) You can find such incorrect receipts with the **Reports** ⇒ **Receipt** ⇒ **Incorrect Receipts** report, and correct them properly with the menu options for creating [duplicate/corrected receipts](#).
- Fixed an undesirable behaviour in [mailing label](#) reports and [envelope](#) printing reports, where if the donor's Address Line 2 is filled in, and their Address Line 3 is empty, and there is something in the Postal Code field, the Postal Code prints on its own line instead of where it should go, after the Address Line 2. (In both Canada and the U.S.A., the postal or zip codes are supposed to follow the city or town and province and state on the same line.)
- Eliminated a problem that one user had after updating from a significantly older version, where it stopped a database schema upgrade (and thus would not start the program) because it said it couldn't drop the view `DONORS_LAST_2YEARS`.
- Fixed a bug, introduced by version 3.63b, where **Reports** ⇒ **Donation** ⇒ **Receipted** wouldn't work - it gave a techie message about an ambiguous column name. (Fortunately, the problem would only occur for users who hadn't used any previous version, or if you created a new database with **Database** ⇒ **Switch Databases** after upgrading to 3.63b.)

#### **Version 3.63b (July 30, 2014):**

- When converting data from [Membership Plus](#), donations with entirely empty amount fields previously caused the conversion to stop with an error. Now they are ignored.

#### **Version 3.63 (July 24, 2014):**



- Changed the installation programs to give a message on their startup screens, saying that you may need to temporarily stop your anti-virus or security programs if you get a messages about "Sharing Violation" during the install, which a few users were having.
- Fixed a bug in the **Database** ⇒ **Merge Duplicate Donors** [window](#) where if the two donors don't occur in all of the same years, the program isn't detecting it, and thus isn't giving the intended option to only do the merge in the current year. In that case, the merge can fail. Also, if the program detects that and you agree for it to only do the merge for the current year, it gives a new message explaining that you can try to do the merge in other years by first moving to them with **Maintenance** ⇒ **Change Year**.
- In the **Maintenance** ⇒ **Change Year** [window](#), if you created the next year before that year had arrived, then switched away from it, and then switched back to it, the program would incorrectly ask you again about whether you really wanted to create the new year. (It didn't recreate it a 2nd time, it just unnecessarily asked that question again.) That has been fixed.
- When validating email addresses, up to 8 characters are now allowed in the last period-separated part of an email address, e.g. as in [bob@web.services](#). Previously a maximum of 6 characters were allowed in that part.
- When [converting from GiftWorks](#), the program is now able to determine more of the organization's information that goes into the **Maintenance** ⇒ **Organization Info** window.
- If you are using the Network Client [version](#) of DONATION, and try to run the conversions from [GiftWorks](#), [Membership Plus](#) or [Church Assistant](#), you now get a message explaining that you can only run those conversions from the computer running the Network Server version of DONATION. (Those conversions never worked before from the Network Client version either, but they didn't give a helpful error message explaining that fact.)

#### **Version 3.62 (June 24, 2014):**

- When you are [importing donors](#) with the **Database** ⇒ **Import** ⇒ **Donors** menu option, if your Excel file contains any cells with newline characters (line breaks) in them, which would prevent the import from working, you now receive a detailed error message explaining that.
- Removed the menu option **Help** ⇒ **Support Forums on the Web** because we are discontinuing the use of that forum, because it really wasn't used much, and it is better to [contact us](#) directly for support.
- Fixed a problem introduced by version 3.61: If you included the "Member #" or "Envelope #" field in a [Custom Report](#), it was adding a total (sum) of those envelope numbers at the bottom of the report! Unfortunately, this fix is only able to work if you do not change the heading for that field from "Member #" or "Envelope #" when you are in the [SQL Select](#) window.
- Fixed a problem when [converting from Membership Plus](#) version 8 or higher: if the database files were in a directory whose name included a single quote / apostrophe, they could not be imported.
- Fixed a problem where if you changed the DatabaseDirectory setting in the DONATION.INI file (**not** recommended, except for [using the database on a USB memory key](#)), and the directory you changed it to included a single quote / apostrophe, the database could not be opened.

#### **Version 3.61b (May 26, 2014):**

- For [converting from GiftWorks](#), made the following changes:
  1. You can now do so from a GiftWorks backup file (*filename.GBF*) as well as the previous option of converting from an actual GiftWorks database file (*filename.GDS*).



2. Fixed a slight error: for payment (donation) types other than cheques with cheque numbers, it was putting the wrong payment type into the Cheque # / Paid By field.
3. Fixed a problem where if the database filename included a single quote / apostrophe, it could not be imported.
4. Fixed a problem where bad donation dates in GiftWorks (whether far in the future or far in the past) caused problems either during or after the conversion. It will now not convert any donation data more than 20 years in the past, or in any future calendar year.

### **Version 3.61 (May 22, 2014):**

- When you are [finding donors](#) by just typing the start of a last name or an entire member/envelope number, with the focus in the Donor List, you can now press **ESC** to eliminate what you have typed and start over.
- Replaced the **Maintenance** ⇒ **Change Year** ⇒ **Previous Year** and **Next Year** sub-menu options with just a main **Maintenance** ⇒ **Change Year** [menu option](#), which brings up a window showing all of the years you can change to. This allows you to move by more than one year at a time (assuming you have multiple years of data in the database), which previously required multiple steps.
- In the **Reports** ⇒ **Custom Reports** [window](#), added a "# Donors" field to the list of Donor fields, and a "# Donations" field to the list of Donation fields, that respectively give the numbers of donors and donations included in each line of the report. This allows you to create custom summary reports that give counts as well as totals of amounts.
- For users with multiple databases, created with the **Database** ⇒ **Switch Databases** menu option, there is now a way to add [command-line options](#) in the Desktop icon for starting DONATION to start it on a specific database, and to have multiple icons for starting on different databases.
- For users of the [Network Versions](#) of DONATION, enhanced the window displayed by the **Tools** ⇒ **Network Client Information** menu option in the Network Server version, to add buttons for **Print**, **Open in Word**, and **Help**.
- For users of the [Network Versions](#) of DONATION, who create multiple databases with the **Database** ⇒ **Switch Databases** [menu option](#), you now no longer have to copy the databases.txt file from the Network Server version's computer to each Network Client version's computer after each change or addition of a database, in order for the Network Client versions to have access to all of the databases.
- Added a new help topic on [Using Mass Email Services](#), like Constant Contact etc.

### **Version 3.60 (April 26, 2014):**

- In both **Reports** ⇒ **Donor** ⇒ **Addresses** and **Reports** ⇒ **Donor** ⇒ **Addresses by Member/Envelope Number**, it is now possible to filter the donors that are included in this report by any of the two donor category fields, or the six Other Info fields. Those additional fields are not displayed on the reports, however.
- Reports created with the **Reports** ⇒ **Custom Report** [menu option](#), or with the **Database** ⇒ **SQL Select** [menu option](#), now do a better job of making the columns only as wide as they need to be to hold the longest retrieved data, and leaving spaces between columns. This fixes problems both where some data could be cut off because columns were too narrow, and reports were unnecessarily wide because columns were too wide. The same fix applies to the optional preview view of data (to allow filtering) from the **Letters** ⇒ **Mass Mailing** [menu option](#).

- Changed **Reports** ⇒ **Bank Deposit** ⇒ **One Deposit Details** to include the section showing the transaction for your accounting program, which was previously only shown in the version of this report accessed from the **Print** button in the **Maintenance** ⇒ **Create Bank Deposit window**. Also, there is now more room for long accounting program account names in the bottom section of that report, except in the case where you are using QuickBooks with classes (because that requires an extra field that needs its own space).
- Added a new table, USER\_LOG, to the database, which tracks each user of the program (based on the Windows username the logged onto their computer with). It records the time they logged on (started) and logged off (exited) the program. You can retrieve data from it with queries in the **Database** ⇒ **SQL Select window** such as "SELECT \* from USER\_LOG where ACTION\_DATE between '2014-01-1' and '2014-01-31 23:59:59'", to see all of the activity in January 2014.
- Fixed a support problem, where if the program cannot find one of its 3rd party components (ChilkatHttp, ChilkatMail, or wodCrypt), a re-install of the full version did not always fix them, and further steps were required to fix the problem.
- Fixed a problem where two menu options on the **File** menu had the same underlined letter.
- The **Help** button in the windows accessed from the [Sort](#) and [Filter](#) buttons in reports did not always work on versions of Windows later than Windows XP. Now they do.
- This version was created with a newer version of PowerBuilder, the program used to create DONATION. (Although this does not change virtually any features, it is a major-enough behind the scenes change to merit a jump in the version numbering from 3.57 to 3.60.)

#### **Version 3.57c (March 14, 2014):**

- Fixed a bug in the Bank Deposit details report (the one from the **Print** button in the **Maintenance** ⇒ **Create Bank Deposit window**), where the final sub-report (of transactions for your accounting program) was cut off, until it had been printed once.

#### **Version 3.57b (March 4, 2014):**

- Fixed a bug in **Reports** ⇒ **Donation** ⇒ **Summary by Dollar Ranges**, introduced by version 3.57, where there were repeated rows for the various groupings appearing in the report.
- A number of reports would previously crash if they prompted for a donation category (possibly in addition to a range of dates), and the category you selected had double quotes in it. You got an incorrect and uninformative error message saying that it was an intermittent bug that only occurred in 64-bit versions of DONATION, and suggesting that you try rebooting your computer (which in these cases would not in fact help!). That problem in all such reports is now fixed.

#### **Version 3.57 (February 26, 2014):**

- There are now three more renameable Other Info fields for the donor, in addition to the existing three. If you wish to use them, you need to turn on their display (and give them the names you want to use for them) in the [Donor tab](#) of the **Maintenance** ⇒ **Main Window Options** window.
- In **Reports** ⇒ **Donation** ⇒ **Summary by Dollar Ranges**, you can now select an optional donation category to restrict the report to, or leave it as being for all donation categories (the way it was before). It is also now possible to filter the donors that are included in this report by any of the following: the Member/Envelope # (for instance, to include only those with such a number), the two donor category fields, or the six Other Info fields.

- In the [Network versions](#), fixed a problem where if the program loses its connection to the database for some reason, it could get a large pile of error messages, one on top of another, if the user wasn't at their computer at the time, and then be hard to close. Also, it now gives an option to reconnect to the database.
- When validating email addresses for donors, the single quote character is now allowed in the first part of the email address (i.e. before the @ sign), as in [o'connor@gmail.com](mailto:o'connor@gmail.com).
- In **Reports** ⇒ **Bank Deposit** ⇒ **Summary List**, added a total of the dollar amounts of all of the listed bank deposits.
- In **Letters** ⇒ **Mass Mailing**, if you chose the Pledge information option, and checked the option to export the data to a file instead of mail merging, and you were using Multi-Year Pledging, the export failed with a technical SQL error. That is now fixed.
- In the **Database** ⇒ **Import** ⇒ **Donors** [window](#), sometimes Excel files when exported to text have too many columns in them, for unclear reasons. When this is the case, you are now given an option to just ignore the additional columns. This also allows for ignoring extra columns that you don't choose to import, that are after the columns you do wish to import. (This change was actually made in an earlier version, but we forgot to note it in the revision history at the time.)
- If you had your Receipt Style in **Maintenance** ⇒ **Receipt Options** set to either Quebec (French only) or Quebec (bilingual French and English), generated a Gift in Kind receipt, and then tried to use the Email/Print button to email it, you got an error message about not finding the object "name", and the email failed. That is now fixed.

#### **Version 3.56d (February 8, 2014):**

- Fixed a problem in the installation programs that caused exporting to formatted Excel in the **Save As** [window](#) when viewing reports to give an error message and fail.

#### **Version 3.56c (February 6, 2014):**

- Some users are still having problems with the **Tools** ⇒ **Check for Updates** [menu option](#) not working, with incorrect error messages about not being connected to the Internet, when they are indeed connected. This version doesn't fix that, but it logs a detailed message about what the problem is, which we can then use for further diagnosis.

#### **Version 3.56b (February 6, 2014):**

- Fixed a bug introduced by version 3.56, where if you tell it to import an Excel file with the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#), after it converts it to a text file, it says it cannot open that text file and the import is cancelled.
- If an import file (Excel or tab-separated text) used in the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#) has more columns on its first line than indicated in your field selections, you are now given an option to continue anyways, just ignoring the extra columns. (Previously that would always cancel the import attempt.) However, if any other line has a different number of columns, the import will still be cancelled.

#### **Version 3.56 (February 6, 2014):**

- When you used the **Tools** ⇒ **Check for Updates** [menu option](#), if for some reason the download of the upgrade file failed, the "Please Wait" window for the download would remain

up after an error message, leading you to think that the download was hanging, and with no obvious way to get out of it. Now that window closes after such an error.

- Fixed a bug in the **Maintenance** ⇒ **Create Bank Deposit** [window](#), where if there are no entries in the **Maintenance** ⇒ **Donation Paid By Values** [window](#) with the "Include in Bank Deposit" checkbox unchecked, you get a techie SQL error message when you click the **Retrieve Deposits** button, and you cannot proceed. (This is actually a very unlikely situation, because virtually everyone will have Paid By values that do not get deposited as part of your bank deposits, like Gift in Kind, credit cards, etc.)
- When you use the **Database** ⇒ **Import** ⇒ **Donors** [menu option](#), sometimes you can get erroneous error messages about having only 1 tab-separated column on a line of the file, when the program sees an empty line that isn't really there! Now empty lines of the file are skipped.

#### **Fixes in Version 3.55c (January 28, 2014):**

- Fixed a minor problem, possibly introduced by version 3.55, where the progress bar in the window showing an [Internet Backup](#) uploading never changed.

#### **Fixes in Version 3.55b (January 25, 2014):**

- Fixed a problem introduced by version 3.55, where you could not [restore Internet backups](#), because you got a message about it being unauthorized, and the password possibly being incorrect.

#### **Fixes in Version 3.55 (January 24, 2014):**

- When you used the **Tools** ⇒ **Check for Updates** [menu option](#), many users were finding that it failed, with an incorrect message saying that they did not seem to be connected to the Internet. That is fixed by this version, however, to get this version successfully, you have to download it from the DOWNLOAD page on the website, at <https://software4nonprofits.com/download-all/>, since Check for Updates isn't working in your current version!

#### **Fixes in Version 3.54 (January 10, 2014):**

- Added the ability to convert and import the data from a GiftWorks program database, with the **Database** ⇒ **Import** ⇒ **From GiftWorks** [menu option](#).

#### **Fixes in Version 3.53 (November 27, 2013):**

- For all receipts for Canada, changed to a newer version of the Canada Revenue Agency's required web address that is printed on the receipts. If you are using the [mail-merge](#) version of the receipts, however, unless you do a new install on a new computer, the receipt template files will not be updated, because that could overwrite any changes to them that you have made. So you will have to make those changes yourself: to [www.cra.gc.ca/charitiesandgiving](http://www.cra.gc.ca/charitiesandgiving) for English receipts, and to [www.arc.gc.ca/bienfaisanceetdons](http://www.arc.gc.ca/bienfaisanceetdons) for receipts for Quebec (French-only, or bilingual). You can do that with the **Edit Mail Merge Receipt** button in the **Maintenance** ⇒ **Receipt Options** [window](#). If you do separate Gift in Kind mail-merge receipts, you will also have to use the **Edit Mail Merge Gift in Kind Receipt** button in that window.

- Prevented installation of the program in a path whose name contains a single quote character, because for some reason that prevents the program from starting properly.

#### **Fixes in Version 3.52 (October 22, 2013):**

- In the **Database ⇒ Import ⇒ Donors** [window](#), removed the requirement that fields including the First Name and Last Name be imported, as long as you are importing the Business Name. (Some import files might be entirely composed of businesses or organizations, with no first/last names for contact people.)
- Improved a message box that you get once a month, if the support period implied by your license key is expired by at least one month, to further clarify that the problem could be **either** that you haven't updated your license key since the last payment, **or** that you haven't paid for over a year.

#### **Fixes in Version 3.51 (October 2, 2013):**

- For Current Donation Information or Individual Donation Information [mail-merge letters](#), added a YTDTOTALAMOUNT mail-merge field, for the total donations from that donor for the year so far.
- Added a section at the end of the Help page for [Importing Data from Viansoft Church Contribution System](#) about resolving problems importing the donations if the Short Date Format set in your Windows Control Panel's Region and Language tool is not something like MM/DD/YYYY.
- Fixed a bug in the window for installing a new license key that in some cases would accept an out-of-date key and indicate it was valid.

#### **Fixes in Version 3.50c (August 25, 2013):**

- There is an undocumented right-click menu on the Donor List area of the main window, with options for New Donor, Edit Donor, Delete Donor, and Find Donor. An error has been corrected where all of those were still visible (though they didn't all work) for users signed in with a [Limited User Password](#). Now the Edit Donor and Delete Donor menu options are never visible for those users, and New Donor is only visible for limited users who have the right to create new donors (as set in the [Limited Users](#) tab of the **Maintenance ⇒ Main Window Options** window).

#### **Fixes in Version 3.50b (July 31, 2013):**

- Switched to using a new version of the program that creates the installation programs, which introduces some new capabilities, but also drops support for installing DONATION on the 13-year-old version of Windows called Windows 2000.
- The conversion to [Membership Plus](#) now handles a newly-discovered type of possible data error in its files, where a donation is not associated with a donor.
- Fixed a bug when installing the Network Client version of the program, where if the Database Directory on the Network Server version's computer has been changed from its standard location, you may get a message about that directory not existing on the Network Client computer, and be unable to complete the install. (The database directory doesn't have to exist on the Network Client computer!)

#### **Fixes in Version 3.50 (June 10, 2013):**

- Changed the installation program, so that a tile for DONATION shows up on the Windows 8 "All Apps" area, and DONATION can be searched for with the Windows 8 feature for searching for applications. For earlier versions of Windows, DONATION now also shows up under Start Menu ⇒ Programs ⇒ Software4Nonprofits, as well as the Windows Desktop (where it always showed up).
- Made it possible to control the font size of [tables](#) in mail-merge receipts and letters, such as «DetailsTable:...», «SummaryTable» etc., by adding some style information to the mail-merge templates (ask for [support](#) for details on how to do this, if it is an issue for you). Also pre-set all of those tables to a font size of 12pt in all built-in template files. (However, the built-in template files installed by the program are only installed the first time you do an installation on a given computer, or if those files are missing - they will not overwrite existing installed template files.)

#### **Fixes in Version 3.49b (May 16, 2013):**

- Fixed a crash in the program after making database backups in the Standalone version, when you are logged in with the [Limited User Password](#).

#### **Fixes in Version 3.49 (April 9, 2013):**

- Fixed a bug when making database backups in the Network Client version only (introduced, I think, in version 3.45d) where you first get an incorrect error message about the database file not existing, and then in the window for specifying the path to backup to, the backup path is shown with no filename component, and you thus have to type that in yourself.
- When converting data from [Membership Plus](#), a check was added to ignore completely empty Fund rows (which get converted to donation categories in DONATION). Previously they would have caused the conversion to halt. There could also be problems where there were donations in the Membership Plus database with no matching donor, again causing the conversion to halt. That was resolved by adding in a fake donor with a Business Name like "Missing Donor 123", to attach those donations to. (One fake donor is added for each internal donor number in Membership Plus that there were donations for, with no matching donor.)
- Fixed a weird problem in reports such as **Reports ⇒ One Date Donation ⇒ Details and Summary**, which have a details section followed by a summary section. In that report, if it was more than one page long, and you used either the **Filter** or the **Sort** button, the summary section disappeared from the view on your screen. However, if you printed it, it was fine, and after printing, the summary section reappeared on your screen.

#### **Fixes in Version 3.48 (March 3, 2013):**

- Added new options for users with a Receipt Style of "U.S.A." in the **Maintenance ⇒ Receipt Options** [window](#), for whether donors receive "intangible religious benefits" for their donations, which then affects the wording on the receipts.
- For mail-merge receipts for users with a Receipt Style of "U.S.A." in the **Maintenance ⇒ Receipt Options** window, there is a new mail-merge field available, ReligiousBenefits, which can be used to determine whether to include some variant wording in the receipts.
- In the **Receipt ⇒ Reprint Range** [window](#), added a checkbox that can be used for marking all of the reprinted receipts as "Corrected", when that is appropriate.

#### **Fixes in Version 3.47 (February 20, 2013):**



- When converting data from [Membership Plus](#), a check was added for there being donors ("members" in Membership Plus) with the same internal unique ID, which would prevent them from being imported into DONATION. As long as those duplicate donors have no contributions, the import will continue, just skipping the 2nd one.
- When you pop up a [calendar control](#) for a date field, previously the only way to get rid of it without making a selection was by pressing ESC. Now you can get rid of it by clicking the same popup button again, or clicking back in the date field, or in most other places on the same window.
- Made **Reports** ⇒ **Donor** ⇒ **Old Donors** much faster (previously it could take multiple minutes if you had quite a lot of data).
- Fixed a problem during a re-installation, if you have configured your database to be located on a [USB memory key](#), and the key containing your database has not been inserted into your computer. Now it will prompt you to do that before continuing the installation.

#### **Fixes in Version 3.46e (January 30, 2013):**

- Made some changes to the program's License Agreement, and various places in both this Help file and the program's website, to clarify the following existing policies: Older versions of the program are never made available, so users whose paid support and upgrades eligibility period has expired need to pay an appropriate fee to download and re-install the current version of the program, unless they keep their own secure permanent copy of the installation program from before their upgrades eligibility period ended, which they can use instead. Also, renamed the "Full License" fee to the "Initial Purchase" fee, for clarity.
- If you try to delete an existing donation on the program's main window by either changing the Amount to \$0, or deleting the Amount, you are now given a message explaining how to delete donations, by using the **Delete** button. (For a full explanation, see [Deleting a Donation](#).)

#### **Fixes in Version 3.46d (January 25, 2013):**

- When converting data from [Membership Plus](#), if negative dollar amounts are found in donations, they are now not imported because they are not allowed in DONATION. However a note about that specific skipped donation is put into the file of messages about the conversion that is shown to the user. Previously negative dollar amounts would cause the conversion to crash.
- Fixed something in the **Database** ⇒ **Import** ⇒ **All Data** [menu option](#) that would prevent it from working correctly - generally a "Foreign Key Validation" error would come up.

#### **Fixes in Version 3.46c (January 20, 2013):**

- Added a missing scrollbar to the Category drop-down in the [Pledges](#) tab of the **Maintenance** ⇒ **Main Window Options** window.
- Fixed a problem that can occur if the Default Category (set in the [Donations](#) tab of the **Maintenance** ⇒ **Main Window Options** window) is deleted, either directly in the **Maintenance** ⇒ **Donation Categories** [window](#), or through the option to delete donors and categories that don't have any donations in the last two years, when you are [changing to a new year](#) for the first time.
- Fixed a problem with [duplicate or corrected receipts](#) when the "Receipt Style for" setting in **Maintenance** ⇒ **Receipt Options** is set to "Quebec (French only)" or "Quebec (bilingual French and English)", where the last letter of the receipt type printed on the receipts was being cut off. (For instance, "DUPLICATA REÇU / DUPLICATE RECEIP", missing the final "T", instead of "DUPLICATA REÇU / DUPLICATE RECEIPT".) Also, in the [mail-merge](#)

version of those French or bilingual receipts, the English version of that receipt type was being put before the French version - corrected that to put the French first.

#### **Fixes in Version 3.46b (January 16, 2013):**

- Fixed a bug when [converting data from Membership Plus](#), which could cause the conversion to fail (with an error message about "violation of foreign key constraint") and possibly could cause the wrong donations to be associated with the wrong donors.

#### **Fixes in Version 3.46 (January 11, 2013):**

- Added a Help page on [Using the Database on a USB Memory Key](#) (another way to handle having copies of the Standalone or Lite version of DONATION on multiple computers).
- Added better messages if the program's database cannot be found when you are starting the program (for example if it is on a USB memory key which you have not plugged in).
- Fixed an error in **Reports** ⇒ **Receipt** ⇒ **Envelopes**, where it would not allow a receipt date to be entered that was after the last day of the current working year. So for instance if you had generated receipts for the year 2012 on January 1, 2013, you could not enter 01/01/2013 as required to select the envelopes for the receipts created on that day.
- Fixed a problem where if you are a Lite version user, and you use the **Tools** ⇒ **Check for Updates** window, and check the checkbox for "Update from free Lite version to full paid Standalone version", it might incorrectly only update you with the update installation program, instead of the full installation program. (That would omit installing some files needed by the Standalone version, including the sample template mail-merge letter and receipt files.) Also, to prevent this problem when using **Tools** ⇒ **Check for Updates** from versions prior to this version, changed the update installation program for the Standalone version to refuse to run when the program is currently a Lite version, and instead give you an option to go the website to download and install the full Standalone version.
- Added the [menu option](#) **Database** ⇒ **Import** ⇒ **From Viansoft Church Contribution System**, which allows you to import donors and donations exported from that program, which is no longer available or supported.
- Some users were getting a message "Unlicensed HTMLMessageBox" at the top of any message box from the program, because the program file that displayed the message boxes had not been updated by an upgrade when it should have been. The program now gives a message on startup if this unexpected situation is still a problem, with instructions to contact us for help resolving it.

#### **Fixes in Version 3.45f (December 23, 2012):**

- Fixed a case where there was a techie (but harmless) error message during **Backup/Restore** ⇒ **Email Backup** in the Standalone version.

#### **Fixes in Version 3.45e (December 22, 2012):**

- In reports created with **Reports** ⇒ **Custom Reports** or **Database** ⇒ **SQL Select**, if the Grid display style was chosen and there were a large number of columns, the order of the columns in the resulting report could come out completely incorrect. That has been corrected.

#### **Fixes in Version 3.45d (December 19, 2012):**

- In the **Reports** ⇒ **Custom Reports** [window](#), added an option for Separate and Grand Totals to the two existing options at the bottom of the window, for Grand Totals and Separate Totals. (And renamed them to Grand Totals Only and Separate Totals Only.)
- Fixed a tiny bug in the **Maintenance** ⇒ **Donation Categories**, **Donor Category 1** and **Donor Category 2** menu options, where a category value that is just "NR" shows as being [non-receiptable](#), when in fact it is receiptable. (A category value has to start with "NR " or end with " NR", with the spaces as indicated, or be exactly "Non-Receiptable", in order to be non-receiptable.)
- Fixed another case (in addition to the one fixed by version 3.45c) where there was a techie (but harmless) error message after doing **Backup/Restore** ⇒ **Backup Database** in the Standalone version.

#### **Fixes in Version 3.45c (December 5, 2012):**

- Prevent a techie (but harmless) error message after doing **Backup/Restore** ⇒ **Backup Database** in the Standalone version, if you have never visited the Backup Frequency and Options window and clicked OK in it. (This error was introduced by version 3.45.)

#### **Fixes in Version 3.45b (December 3, 2012):**

- Changed the Bank Deposit reports to add in a summary by Paid By (Cash / Cheque etc.). This includes both the report printed by the **Print** button on the **Maintenance** ⇒ **Create Bank Deposit** [window](#), and **Reports** ⇒ **Bank Deposit** ⇒ **One Deposit Details**.

#### **Fixes in Version 3.45 (November 30, 2012):**

- Added a new menu option **Help** ⇒ **Training Videos on the Web**, which goes to the Demos and Samples page on the program's web site. That page has both introductory and in-depth training videos on it that you can watch.
- Three reports under **Reports** ⇒ **Donor** ⇒ **Donation Info** - the **Sort by Name**, **Sort by Amount**, and **Sort by Member/Envelope #** ones, gave as their headings "This Year" and "Last Year", without saying which years those were. That could be confusing if you were working on different years of data, or going back to previous years to run earlier reports etc. The headings have been changed to things like "2012 Total" and "2011 Total" etc.
- Changed the **Database** ⇒ **Delete Old Data** [menu option](#) to only allow deletion up to the 3rd year prior to the current calendar year (for example up to 2009 if it is currently 2012).
- Fixed a bug in the [Network](#) versions, where you could get a techie error message about "Row Changed between Retrieve and Update" on the SETTINGS table in the database, if two users were using a similar function at the same time.
- Fixed two problems with entering only the [month and date](#) for a donation date on the main window, then tabbing out of the field to have it fill in the year. First, the date didn't get saved as the new default date, for the next donation to be entered. Second, if you were working in a previous year's data, the year that got added was the current calendar year, and you could actually save a transaction with that date, even though it was in the wrong year! (Now, whichever year you were working on is the year that gets added to the month and day you entered.)
- If you click on the text "Find Name / #" below the Donor List, or the field to its right, you used to immediately be taken to the Help topic "Finding a Donor" to learn how to do that. Now, clicking on either of them instead displays a message briefly explaining how to find donors, and offering you an option to view that help topic.

**Fixes in Version 3.44c (October 19, 2012):**

- Fixed a minor problem in the **Database ⇒ Change Date of Donations** [window](#), where the [popup calendar](#) buttons were only slightly visible, and didn't work, and neither did the special keys for [changing dates](#), like "T" for today, or "+" and "-" for increasing or decreasing a date by one day.
- Changed the uninstaller to warn about not removing the novaPDF printer if you also have Software4Nonprofits [ACCOUNTS](#) installed, and similarly with removing the Firebird Server (for the Network Server version of DONATION).

**Fixes in Version 3.44b (October 16, 2012):**

- Added a **Reports ⇒ Bank Deposit** [sub-menu](#), containing **Summary List** (one row per bank deposit on this year's donations) and **One Deposit Details** (details and category totals for one date's bank deposit).
- Addressed an unusual situation in the [Bank Deposit](#) entry window, where the Advantage Account field isn't displayed because you have chosen not to display the Eligible Amount field in the donation details area. But if you actually have donations that you retrieve that do have Eligible Amounts filled in, you will get a message about it, and that Advantage Account field, which is now needed, will be displayed for you.
- Fixed a small subtle bug. If you selected a donation date with the calendar popup, then used the mouse to click into another field, that donation date didn't become the default donation date for further donation entry. If you instead Tabbed out to the next field, it did become the default date, as it should. Now either method works.

**Fixes in Version 3.44 (October 15, 2012):**

- Added support for bank deposits, including setting up for them with the new **Maintenance ⇒ Configure Bank Deposits** [menu option](#), and creating individual bank deposits with the new **Maintenance ⇒ Create Bank Deposit** [menu option](#). As well as being able to print out a report with all details of each bank deposit, you can export a transaction for the bank deposit for importing into either Software4Nonprofits [ACCOUNTS](#), or Intuit QuickBooks.
- Added **Reports ⇒ Category ⇒ Accounting Accounts**, which is only visible if you have configured bank deposits. It shows the correspondence you have set up between donation categories and accounts in your accounting program.
- When requesting license keys from the Evaluation and Licensing window, it now handles accented characters correctly.
- When viewing reports, **Ctrl+P** will now print the report (as well as **Alt+P**, which worked before).
- When you go to **Maintenance ⇒ Email Sending Configuration**, or **Backup/Restore ⇒ Email Backup** for the first time, when you have not previously configured your email settings, the program will take them from the Email Sending Configuration in the Software4Nonprofits ACCOUNTS program, if that program is also installed.
- Throughout the program and this Help file, changed things like "Ctrl-C" to read "Ctrl+C". Both mean that you hold down Ctrl and press C.
- Fixed a bug where you get a techie error message after failing to enter the program, if you put in the wrong program entry password 3 times.
- Removed various wording in the Help that suggested that charities in the U.S.A. aren't required to give receipts for under \$250, because the donor can use their canceled cheque as their receipt. (I understand that is no longer the case, and that donors need receipts for all donations they wish to claim on their taxes.)

- Fixed a bug where the program stops responding if any of the [special keys for dates](#), other than "T" for Today, are used in a blank date field.
- Fixed a problem in relation to using the button to pop up the calendar control for the donation date on the main window. If you clicked the button and changed the date in the calendar window, if that was the only change on the row, and you didn't tab out of the field, the Save button didn't become enabled, to save that change.

#### **Fixes in Version 3.43f (August 13, 2012):**

- Fixed a bug introduced by version 3.43b (or perhaps 3.42c) that stopped the **Find Next** button on the Find Donor window accessed from the Batch Entry [window](#) from doing anything.
- In the installation program, don't allow the user to use the Windows Desktop as the installation directory, because that scatters all of the program's files over the Desktop.
- When restoring backups, the program has always saved the previous version of the database you are restoring on top of as that database name with ".PREVIOUS" added. That previous version is now stored in a Temp subdirectory under the database's directory, rather than in the database's directory as it previously did.
- Removed a misleading message when you change your Internet Backup password, suggesting that you need to use the Setup Storage button in the [Backup Frequency and Options](#) window to change it back. (You don't.)
- Made **Reports** ⇒ **Donor** ⇒ **Potential Duplicates** slightly narrower, in response to a report from one user that it was putting blank pages between each page. (Being a tiny bit too wide is the usual cause of that.)

#### **Fixes in Version 3.43e (July 25, 2012):**

- On the main window, there was no calendar image on the button for the popup calendar to the right of the Date field in the Donation details area - put it back in.
- On versions of Windows prior to Windows 7, the new popup calendar was a bit too short, so the last line of dates was partly cut off. Fixed that.

#### **Fixes in Version 3.43d (July 24, 2012):**

- Fixed an error in the installation program for all new installations (Standalone, Lite or Network Server) where it failed to create the initial empty database file, and thus the program got an error message about "Unavailable database" on startup, and would not start.
- Fixed a bug on the initial startup of the program, after entering your Organization Info, you get a message about "Null object reference in line 34 of w\_category". That causes the program to exit, but it works fine when you restart it.

#### **Fixes in Version 3.43c (July 23, 2012):**

- In the new [popup calendar](#), changed it to use Sunday as the first day of the week, rather than Monday as in version 3.43b.

#### **Fixes in Version 3.43b (July 23, 2012):**

- Replaced the [popup calendar](#) that is available for data entry of dates with a new version, which works slightly better, and changed to pop it up with a calendar button, rather than a



drop-down arrow. Unlike the previous version, this new calendar cannot be closed without making a selection by clicking on that same button again. Instead, you can press **ESC** to do that.

- Added a calendar button for a popup calendar to other places in the program where you can enter dates, for instance windows prompting for a date or a date range for reports.
- Added a few additional "magic" [keystrokes](#) you can use when entering dates directly.
- For technical reasons, license keys never work if you have two or more spaces in a row in your Organization Name. Put in some checks and fixes to prevent that situation and problem.
- Put in some code to try to help a situation where a user with dual monitors could not run the program, because it incorrectly reported that their screen dimensions were not set to at least 800 x 600 (the minimum at which DONATION will work properly).
- Put in some code into the Network Server version installer to try to ensure that the Firebird database server definitely gets installed in cases where the system is confused about whether it is installed already.
- Put in a check that you are not trying to use your Unique ID for Internet Backups (or an initial part of it) as your password for Internet Backups, which should be something you make up that is completely different.
- Fixed a tiny annoyance: if you used **Ctrl+F** (rather than the documented option **Alt+F**) for Find Donor in the One Date Batch Entry [window](#), it worked, but it also beeped. Now it no longer beeps.
- Fixed a bug that while you could save a value including a slash (such as "Debit/Credit") in the **Maintenance ⇒ Donation Paid By Values** [window](#), only the part prior to the slash would show up in the Cheque # / Paid By field on the main window or the One Date Batch Entry window.
- Fixed another bug with that same window: If you accidentally choose the wrong selection between Canada and the USA when you first setup your DONATION database, and then make changes in this window, and only after that fix the wrong country selection via **Maintenance ⇒ Receipt Options**, the wrong spelling of Check vs. Cheque will be "locked in" and unable to be changed. (Now the program fixes that automatically.)
- Fixed a bug that gave a wrong (techie looking) error message if [limited users](#) entered invalid donation dates on the program's main window.
- Prevent limited users from logging in to the program if it is set to work on a prior year.

#### **Fixes in Version 3.43 (June 6, 2012):**

- This version uses a new ODBC driver, which is the software that interfaces between the program itself and the Firebird database that it uses. This change will be largely invisible to users, with a couple of exceptions, as follows. (1) If you run memorized Custom Reports, that were memorized with a prior version, their column headings may now include a database table name where they didn't do so before, such as a heading "Donor Name" instead of just "Name". If it is import to you to fix this, please [contact us](#) for details on how to do so. (2) Also when re-running prior memorized Custom Reports, if they were saved with Filter or Sort criteria, those may no longer be valid, and you may receive a message telling you that you need to re-create the Filter or Sort and then re-memorize the report.
- Added a new [report](#), **Reports ⇒ Donor ⇒ Actual Duplicates**. It is similar to the **Potential Duplicates** report in the same sub-menu, but only shows duplicates where the name is exactly the same (though possibly with different capitalization). The Potential Duplicates report also shows names that sound alike, which may identify some names entered twice, with typos in one of the names.



- The [Find Donor](#) window now allows you to also find by email address, as well as the previous fields it allowed.
- On the main window when you are [entering](#) or editing donations, and on the One Date Batch Entry [window](#), the drop-down list for the donation Category now has an additional entry "<Add New>". Selecting that entry brings up the **Maintenance ⇒ Donation Categories** [window](#), already set up to add a new category. If you add one and close the window, that new one becomes the category for the current donation row.
- On the main window when you are [entering](#) or editing donors, the drop-down lists for the donor Category 1 and Category 2 fields now each have an additional entry "<Add New>". Selecting that entry brings up the **Maintenance ⇒ Donor Category 1** or **Donor Category 2** [window](#), already set up to add a new category. If you add one and close the window, that new one becomes the corresponding category for the current donor.
- Changed the **Maintenance ⇒ Organization Info** [window](#), so that when it is automatically shown to you the first time you initialize the information for a new organization, you can fill in a new Receipt Style For field, which could previously only be edited on the **Maintenance ⇒ Receipt Options** [window](#). This means that you don't have to visit that Receipt Options window during your initialization for the organization. (On subsequent visits to the Organization Info window, the Receipt Style For field can be viewed but not edited - you still edit it with the Receipt Options window.)
- Removed the automatic display of the **Maintenance ⇒ Donation Categories** [window](#) that was automatically shown to you the first time you initialized the information for a new organization.
- If you try to delete a donor or donation category and you can't because there are donors or donations already with that category selected for them, you now get a more informative message about what you can do about that.
- Fixed a bug in the **Database ⇒ Import ⇒ Donors** [window](#), where if you get an error about not being able to import Category1 or Category2 fields because you haven't set up any of those those values, you can't try the import again without first exiting the program. (If you do try it again, you get an error message about not being able to open certain files.)
- Fixed a bug where **Reports ⇒ Donor ⇒ Potential Duplicates** could crash the program with the error message "Malformed String" if there were names in the database whose first character was an accented character, such as "ÉLISE".

#### **Fixes in Version 3.42c (April 24, 2012):**

- Corrected an error in the help page on [fiscal years](#), where it said that it does not handle pledging on a fiscal year basis (it does, for annual pledges with categories).

#### **Fixes in Version 3.42b (April 4, 2012):**

- Fixed a bug that caused the program to crash after downloading an extra needed component, if you were [converting](#) data from Membership Plus version 8 or higher, during the program's first startup.

#### **Fixes in Version 3.42 (April 2, 2012):**

##### New Fiscal Year Features

A number of features were added for handling reporting for organizations with [fiscal years](#) different from the calendar year:

- You can set up your fiscal year's start date in the **Maintenance ⇒ Organization Info window**. (This defaults to January 1 if you don't change it, meaning the fiscal year is the same as the calendar year, and thus other fiscal year features are not available.)
- Added a new **Reports ⇒ Fiscal Year sub-menu**, with 7 new reports on it. If your fiscal year is the same as the calendar year, trying to use these reports just gives a message explaining that they are not relevant.
- Added fiscal year selection options for donation dates, in the **Reports ⇒ Custom Reports window**.
- Added support for new :FISCAL\_START\_DATE and :FISCAL\_END\_DATE arguments in the **Database ⇒ SQL Select window**. (They are used by Custom Reports, when you choose to use a fiscal year selection.)
- Added support for [pledges](#) being on a fiscal year basis (specified in the [Pledges tab](#) of the **Maintenance ⇒ Main Window Options** window). This affects Pledge information mail merge letters, pledge reports, and Custom Reports including pledge fields.

#### Other Changes in this Version

- Improved all four reports under the **Reports ⇒ Donor ⇒ Donation Info sub-menu** to no longer exclude donors from the report that were present in prior years, who have been deleted from (or never copied forward to) the current year. Made a similar fix to **Reports ⇒ Donor ⇒ Old Donors**, so that it includes all donors from both this year and last year that have not donated in either year, but did donate in earlier years. Similarly, in the **Reports ⇒ Custom Reports window**, if you do a multi-year report for just the prior and current working years in the program, it will no longer exclude donors present in last year's donor list but absent from this year's list.
- The reporting changes in the previous point make the use of the **Database ⇒ Copy Missing Donors ⇒ From previous year to current year menu option** less necessary, because it was often used to fix the fact that those reports were missing donors from the previous year that weren't also in the current year.
- Fixed a bug when mail-merging [receipts](#) or letters, where sometimes the page breaks between successive donors' letters or receipts were ignored, due to a bug in Internet Explorer's handling of page breaks. (This mostly happened with longer merge documents, for instance if you added a letter before or after the mail-merge receipt.)
- In the [mail merge editor](#), added two new menu options, **Insert ⇒ Logo Image** and **Insert ⇒ Signature Image**, for inserting those images, which you specified using the [window](#) accessed via the **Select Logo and Signature Images** button on the **Maintenance ⇒ Receipt Options** window.
- In the [window](#) accessed via the **Select Logo and Signature Images** button on the **Maintenance ⇒ Receipt Options** window, if you click the **Browse** button, it was defaulting to show only files matching \*.bmp, which could make you think you could not use GIF or JPEG files (you could). Now it shows all files by default.
- If you click the **Memorize button** on the reports-viewing window, and it is for a standard built-in report (not a Custom Report or one created with **Database ⇒ SQL Select**), and you not have modified the report in any way with the **Sort**, **Filter**, or **Load SQL** button, you will be given a message and not allowed to save the report. That is because there is no point saving standard reports, which you can always run from the regular **Reports** menu options, the same way you ran it the first time!
- Fixed a problem when [converting data](#) from Wincrafters Church Assistant, where if there were completely empty categories in the data (no number or name), they would be imported as "Category #0", and generated one warning message for each such empty category.

- Added a properly worded error message if you made an unacceptable entry in the Annual Pledge field for the donor (for example if you entered it with a dollar sign, which is not allowed). Somehow that had been left with only an uninformative techie error message.
- If you choose not to show the Annual Pledge field in the Donor tab of the **Maintenance** ⇒ **Main Window Options** [window](#), the Pledges sub-menu on the [Reports](#) menu and the [Report Browser](#) are now both hidden, because they will not be of interest.
- Fixed a bug in **Reports** ⇒ **Donation** ⇒ **Summary by Paid By**, where if you selected a date range to report on that was not the entire year, the "Total Distinct Donors across all Paid By values" number at the bottom of the report was incorrect (it was for the entire year).
- Fixed a bug with the very infrequently-used **Load SQL** [button](#) on the reports-viewing window, where if the SQL you were loading was invalid, it could crash the program.
- Made **Reports** ⇒ **Donation** ⇒ **By Donor by Category** slightly less wide, to fix a problem one user was having where the last character on each line was going onto an extra page.

#### Fixes in Version 3.41d (February 18, 2012):

- Moved the **Check for Updates** and **Request or Install License Key** menu options from the over-crowded **Help** menu to the **Tools** menu.
- If you are installing a new license key, and you get a message that it is rejected because it does not match your Organization Name, that message is now clearer, explaining that you may need to request an updated license key to match any change you have made to your Organization Name.
- Fixed a bug, where if you are a Canadian user and you checked the "Use different receipts for Gifts in Kind / Non-Cash Gifts" checkbox in the **Maintenance** ⇒ **Receipt Options** [window](#), that setting worked until you exited the program. When you restarted the program the next time, however, that setting would have disappeared, and you would have had to set it again if you needed it.
- In newer versions of Windows (for example Vista or 7), the **Help** ⇒ **Using Help** menu option was not working. Fixed that, and renamed that option to **How to Use Help**.

#### Fixes in Version 3.41c (February 13, 2012):

- You are now prevented from [emailing receipts](#) if no [signature file](#) has been specified in **Maintenance** ⇒ **Receipt Options**. (If you were allowed to do that, you would end up sending out unsigned receipts!)
- Fixed two potential problems with Internet [Backups](#), if you used the same Unique ID for multiple DONATION databases that you [switch](#) between on the same computer. In that case, first of all only the latest three backups for any database would be saved - not the latest three backups for each, as was intended. Also, when doing an Internet [Restore](#), you would be prompted with a list of your Internet backups of all of your databases, and you could erroneously select a backup of the wrong database to restore.
- Fixed a problem in the [Membership Plus](#) conversion, where if there were Family names with no associated Individual, the Family name got put into the Business Name field in DONATION instead of being split up into a First Name and Last Name field, at an appropriate space.

#### Fixes in Version 3.41b (February 8, 2012):

- The check for a [strong passwords](#) in [Internet backups](#) and restores and [email backups](#) had a bug. It was checking that your password included at least three of the four types: capital

letters, small letters, digits, and symbols. But the checking was wrong, and it counted capital and small letters as only one type, thus giving incorrect messages about a password such as Azzz4321, which did contain three types, being not strong enough. That is now fixed.

### **Fixes in Version 3.41 (February 4, 2012):**

- There are new functions for making secure Internet [Backups](#) and [Restores](#), which first have to be configured via new options on the **Backup/Restore ⇒ Backup Frequency and Options window**. The first time you make a [normal backup](#) after installing or upgrading to this version, you will be asked whether you wish to follow each normal backup with an Internet backup, and if you answer Yes, be sent to the window where you can configure that.
- Internet backups and restores, and [email backups](#), now check whether the password you are using is a [strong password](#). For Internet backups and restores, you are not allowed to use a weak password. For email backups, it is recommended that you not do so.
- In the **Backup/Restore ⇒ Backup Frequency and Options window**, you will now be asked to confirm if you change the frequency of backup reminders to "Never", with a warning that if you do not have an alternate backup method setup, this risks you forgetting to make backups, and losing your data if your hard drive dies.
- Added **Reports ⇒ Donation ⇒ Summary by Dollar Ranges**, that shows the counts, dollar totals and percentages of donor's total donations amounts within various dollar ranges, for the current and previous years.
- The **Database ⇒ Import ⇒ Donors window** now allows you to also import the Donor Category 1 and Category 2 fields, which previously could not be imported.
- In the window for sending emails for [Email Backups](#), [Emails to a Donor](#), or emailing [reports saved to files](#), there are now checkbox options to Cc: or Bcc: the same email to your own From Email address.
- In both the installation program, and in certain places in the program, you will now be prompted with an option to turn off the unhelpful Windows default setting "Hide extensions for known file types", which causes program files like DONATION.EXE to be displayed as just "DONATION", database files like DONATION4.DB to be displayed as just "DONATION4", etc.
- Changed all dialog boxes prompting for a file to open or save to be new-style dialog boxes, and to have a Help button that displays appropriate help for whatever feature that dialog box is being used for (such as saving or restoring backup files etc.).
- When you start the program after an update from a previous version, you will now be given an option to read the Revision History help page, to see what changes were made in your new version.
- Windows displayed when files are being downloaded (for example when downloading an update in the **Help ⇒ Check for Updates window**) now show a progress indicator, so you can see how close to finished they are. (This is possible because a new powerful 3rd-party control is now being used for most Internet access done by the program.)
- Put in a fix to the **Database ⇒ Validate menu option**, that may allow it to work when sometimes it would not in the past.
- Fixed a tiny bug in the window for [specifying a Logo](#) and/or Signature for your receipts: the Help button did nothing.
- Fixed a tiny bug in the window for [Importing Donors](#): the Help button did not go to the correct Help topic.
- Fixed a few oversights for users using the [Limited User Password](#): They can now no longer see **Reports ⇒ Memorized Reports** or **Reports ⇒ One Date Donation ⇒ Details with Description**, because both could show names. They can no longer use anything on the

**Backup/Restore** menu except for **Backup Database**, because it does not seem appropriate for them to be the ones deciding to restore a backup. They can no longer see **File** ⇒ **Send Email** because that does not seem appropriate. They can no longer see **File** ⇒ **Edit Comments**, unless they are allowed to add new donors, and then only when they are adding a new donor.

- In the **Maintenance** ⇒ **Organization Info** [window](#), if you enter an Organization Name 2 but your Receipt Style in the **Maintenance** ⇒ **Receipt Options** [window](#) is not set to one of the options for Quebec, you are now warned that that second Organization Name will not be printed on the receipts.
- For users with @earthlink.net email addresses, who are using the first [window](#) of **Maintenance** ⇒ **Email Sending Configuration** and basing the configuration just on their email address, rather than the settings in an existing email program, DONATION was suggesting the wrong SMTP server (smtp.earthlink.net). That has now been corrected to use smtpauth.earthlink.net.
- Fixed a problem where you got a techie error message if you tried to add a 2nd donation or donor category with the same name as an existing one, in the **Maintenance** ⇒ **Donation Categories** [menu option](#) or the **Maintenance** ⇒ **Donor Category 1** or **Donor Category 2** [menu option](#). Now you get a nicer error message.
- Added a check that prevents you from adding a second Paid By value with the same name, in the **Maintenance** ⇒ **Donation Paid By Values** [menu option](#).
- Fixed a bug in the **Database** ⇒ **Import** ⇒ **Donations** [menu option](#), where Donation Categories containing single quotes (or apostrophes) could not be imported.
- Fixed an obscure bug in the **Database** ⇒ **Import** ⇒ **Donors** [window](#), where if data fields to be imported contained just one or more spaces, they were imported that way, rather than as empty. (This particularly caused a problem for the Business Name field, because if it contains spaces, just those spaces are displayed, invisibly, as the name in the Donor List.)
- Fixed a problem in the [mail-merge editor](#) where the scroll bar on the right was too thin, in some versions of Windows.
- Fixed a problem where if you had named a database backup file with the file extension ".gbk", in lower case, rather than the default uppercase ".GBK" suggested by the program, and then double-clicked on that file, DONATION would not prompt you to [restore](#) it when it opened, as it is supposed to do.

#### **Fixes in Version 3.40b (December 15, 2011):**

- Fixed a bug in the built-in receipts for the Receipt Styles for "Quebec (French only)", and "Quebec (bilingual)", where if only the Organization Name and not Organization Name 2 is filled in, in **Maintenance** ⇒ **Organization Info**, the organization name does not display on the receipts.

#### **Fixes in Version 3.40 (December 14, 2011):**

##### Changes to Improve the Database Backup and Restore Features

The following changes were made to help prevent problems where a few users have restored a backup containing only data older than the data in their current database, not realized it, and gone on with data entry. That caused gaps in their data, because they lost the newer data that was in the database before they did the restore.



- Database backups made with the **Backup/Restore** ⇒ **Backup Database** [menu option](#) or the **Backup/Restore** ⇒ **Email Backup** [menu option](#) now have the date added to their filenames, for instance DONATION-2011-12-31.DB.GBK for a regular backup made on December 31, 2011. For multiple backups made on the same date, a sequence number is also added to the filename.
- Database restores done with the **Backup/Restore** ⇒ **Restore Database** [menu option](#), the **Backup/Restore** ⇒ **Restore Emailed Backup** [menu option](#), or the **Backup/Restore** ⇒ **Restore Non-Backup Database** [menu option](#) now all check that the data in the database being restored is not older than the data in your current database. If it is older (which means that you will lose some recent data by doing the restore!) you are warned about this, and asked whether you still wish to proceed.
- The **Backup/Restore** ⇒ **Backup Reminder Frequency** menu option has been renamed to **Backup Frequency and Options**. The [window](#) that comes up for it now also includes options for whether to retain all backups made in a given drive or directory, or to only retain a specific number of the latest backups made in a given drive or directory. (This is helpful because with the new naming of backups that includes the date, multiple backups will tend to accumulate in your backup drive/directory.)

#### Other Changes in this Release

- Sometimes the program would prompt you about having to check which country you were working in, in order to confirm the correct receipt style to use, when it did not have to do so, for example when you had moved the program to another computer and restored a database backup. Now it only prompts you about that when it really does need to do so, because you are setting the program up for the first time.
- A number of reports, which are supposed to be in the portrait orientation (rather than landscape), could have come out in landscape instead if the user's printer was set to default to landscape. They have been changed, to force them to use portrait orientation, so that they will print as they were designed.
- Fixed a problem where clicking the **Submit** button in the Submit Registration Information [window](#) (accessed via **Tools** ⇒ **Register Online**, or from the startup prompt asking whether you have registered) could crash DONATION, giving the "This program has stopped working" message.

#### **Fixes in Version 3.39e (December 1, 2011):**

- Made slight alterations to the windows for sending an email to request a license key, or to request an evaluation extension, to separate out the un-editable part of the request from an optional comments section (for a license key request) or a required reason for the request (for an evaluation extension).
- Added a window for prompting users who have not yet registered to do so, or to say that they have already done so, as part of the program's startup.

#### **Fixes in Version 3.39d (November 15, 2011):**

- Added a new mail merge code «else», that can optionally be used between the «if:FIELDNAME» and «endif» [codes](#), to provide alternative content.
- Put the **Load SQL** [button](#) back onto the reports-viewing window, for use in unusual circumstances. (Its features, and that of the **Save SQL** button that was not put back on, were



mostly replaced by the [Memorized Reports](#) feature added in version 3.38, at which time those two buttons were removed.)

- Fixed a problem where the organization name printed on the built-in receipts could have some characters at the end cut off, because the font size was too large, especially when the organization name is all capital letters.
- Fixed a problem in the [Membership Plus](#) conversion, where if there were certain inconsistencies in the donation data (which Membership Plus splits between several database tables) the conversion would fail.

#### **Fixes in Version 3.39c (October 29, 2011):**

- Addressed another problem when [converting data](#) from Wincrafters Church Assistant, where there could have been duplicated donations in its data due to a bug in Church Assistant. In that case, the conversion process prompts with an option to delete those duplicated donations.

#### **Fixes in Version 3.39b (October 29, 2011):**

- Fixed a problem when [converting data](#) from Wincrafters Church Assistant, where the conversion would fail if there was a duplicate donation category name in the Church Assistant data.
- Addressed another problem in that conversion from Wincrafters Church Assistant, where the donation data in Church Assistant, which should have all been for the current year, contained some data in another year. In that case, the conversion process prompts with an option to convert it to the current year.

#### **Fixes in Version 3.39 (October 22, 2011):**

- The [Find Donor](#) window now allows you to find by phone number or address, as well as by name or member/envelope number as it previously did. It also allows you to find by a combination of any of those four fields.
- In the One Date Batch Entry [window](#), added a popup tooltip, when you hover your mouse over the Name field for a donor, that displays the donor's phone number and address, if they have been filled in.
- Renamed the **Tools = Register by Email** [menu option](#) to **Register Online**, and changed it so that it forwards the information on your window to the REGISTER page on the Software4Nonprofits.com web site, which you can then review and Submit there.
- If you try to delete a donor that has donations, you have always received an error message saying that is not allowed. That error message has been expanded, to explain how to delete it, by first deleting the donations and then the donor, or by using the **Database = Merge Duplicate Donors** menu option.

#### **Fixes in Version 3.38c (September 19, 2011):**

- When entering donation dates on the main window, you can now enter only the month and day parts, and leave off the year - the program will fill in the year for you. For instance, if your date format is MM/dd/yyyy, and you enter 1/31 when you are working on the 2011 year, it will replace it with 1/31/2011 when you press Tab or click out of the field.

- Fixed a bug that prevented users making [Evaluation Extension](#) requests from putting in a reason for the request, because the field that contained the request and the prompt for the reason was not editable.
- Fixed a bug introduced by a recent version, where you could not always successfully save changes to the Pledge Type on the [Pledges tab](#) of the **Maintenance ⇒ Main Window Options** window.

#### **Fixes in Version 3.38b (September 5, 2011):**

- Added two new [reports](#) under **Reports ⇒ One Date Donation**: Details with Description, and Details with Mbr/Env # and Description. These are like the corresponding existing Details reports except for the addition of the donation description field (which requires them to then be printed in landscape mode, in order to have enough room for all of the fields).
- Added a new [report](#) under **Reports ⇒ Donation ⇒ All Donations**: Sort by Date, with Description. This is just like the Sort by Date report except for the addition of the donation description field.
- Fixed a bug introduced by a change in version 3.38, where when you try to use the **Email/Print** button on statement reports or built-in receipts, the "Printing to PDF File" window would appear but would never close, so the emailing didn't work.
- Fixed another bug introduced by a change in version 3.38, where if that version was the first version that was ever installed on your computer, [saving reports](#) to PDF files and [emailing](#) reports, receipts, or letters, would not work properly.
- Added the capability to convert data from [Membership Plus](#) versions 8, 9 and 11.
- Fixed a problem in the [Membership Plus](#) conversion, where it was not correctly handling missing fund names (what DONATION calls donation category descriptions).
- In the Save As [window](#) for reports, the option of displaying a report saved as tab-separated text in Excel was removed, because Excel wasn't opening-separated text files properly – it was cramming most of the columns together into Excel's first column.
- Corrected a problem where mail merging letters or receipts could fail to properly handle Unicode characters (for example characters in non-English character sets).

#### **Fixes in Version 3.38 (August 13, 2011):**

- Introduced [memorized reports](#) (not available in the Lite version), which allow you to memorize either built-in reports, with custom Sorts and Filters, or Custom Reports (or SQL Selects). You can then re-run them later with **Reports ⇒ Memorized Reports**.
- Fixed a longstanding annoyance when saving reports or built-in receipts to PDF files (or emailing them, which also saves them to PDF), that you had to run DONATION as Administrator on some versions of Windows. That is no longer a problem - you can run DONATION normally, and all PDFs work.
- Changed **Reports ⇒ Receipt ⇒ All Receipts**, so that if you are displaying the Eligible Amount field in the Donation Details area (as determined on the [Donations](#) tab of **Maintenance ⇒ Main Window Options**), both the Total Amount and the Eligible Amount of each receipt appear on that report.
- Changed so you can [email](#) both Individual Donation and Donor mail-merge letters. (Previously those two types couldn't be sent by email, although all other types could.)
- Fixed a bug which could happen when you [email](#) any mail-merge letters or receipts created with **Letters ⇒ Mass Mailing**, but only occurred if you have Internet Explorer version 9 installed on your computer. The bug was that the email merges would fail, with a message to the effect of "The mail merge was apparently not completed successfully for sending the

email to the email address ... because the contents of the «Name» field were not found in the merged document", or "Null object reference at line 11 in function of \_get\_body\_html of object u\_web\_browser".

- Fixed another bug where you would get that same message, and email merges would fail, in the unexpected situation where your template document being merged didn't contain the «Name» field.
- Included a newer version of the novaPDF printer driver, so it will be re-installed with any full install of DONATION (though not with an update, through **Help** ⇒ **Check for Updates**). There are no important new features in this, so it is not a concern that novaPDF is not updated by an update to the program.
- Fixed two problems in the [Membership Plus](#) conversion. First, it would not convert if the first line of the organization address was missing. Second, it was not correctly detecting duplicate donation category names, which are possible in Membership Plus, or correctly fixing them.
- Fixed a problem when [converting data](#) from Wincrafters Church Assistant, where a blank donation category could be imported from it into DONATION, if it was present in the Church Assistant data.
- Fixed a bug where the [«DetailsTable»](#) mail merge field could not be retrieved for Pledge letters, when your short date format was DD/MM/YYYY, rather than the more common MM/DD/YYYY. (This bug does not occur with the standard Simple Annual Pledge [type](#), only the newer Annual with Start Date and Category or Multi-Year pledge types.)

#### **Fixes in Version 3.37d (June 15, 2011):**

- Fixed a problem that occurs only for users whose first install of DONATION on their current computer was version 3.37c, where after you add a new donor, if you switch away from it on the Donor List then come back to it, its details don't appear in the Donor Details area on the right.

#### **Fixes in Version 3.37c (May 19, 2011):**

- Put in protection against an unlikely but possible problem when [converting data](#) from the program The Church Assistant from Wincrafters, where you could end up apparently working in the year 0!

#### **Fixes in Version 3.37b (May 4, 2011):**

- Fixed some bugs in Membership Plus [conversions](#), when there is odd or too-long data in Membership Plus. Also, added a question in that conversion, asking whether to skip importing members (donors) that had no donations in the last two years of data.
- Added conversion from Membership Plus versions 7, 10 (2007) and 12.

#### **Fixes in Version 3.37 (April 23, 2011):**

- Made some fixes that may prevent errors when [converting data](#) from the program The Church Assistant from Wincrafters.
- Added [conversion of data](#) from versions 5 or 6 of Membership Plus, via the **Database** ⇒ **Import** ⇒ **From Membership Plus** menu option.

#### **Fixes in Version 3.36b (April ???, 2011):**

- Added the capability to [import PAR donations](#) (the United Church of Canada's Pre-Authorized Remittance program), through the new **Database ⇒ Import ⇒ PAR Donations** menu option.

#### **Fixes in Version 3.36 (April 10, 2011):**

- Added the capability to [convert data](#) from the program The Church Assistant from Wincrafters, when you are running DONATION for the first time.
- Moved the three Importing menu options on the **Database** menu to a new **Database ⇒ Import** sub-menu.
- Added a menu option **Database ⇒ Import ⇒ From Church Assistant**, which gives another way to import data from The Church Assistant if it was not done on the initial startup of DONATION.

#### **Fixes in Version 3.35c (April 2, 2011):**

- Fixed a bug introduced by version 3.35, where both Current Donation Information and Total Donations Information mail merges would fail, if your Short Date format set in Control Panel's Regional and Language Options tool was dd/MM/yyyy.

#### **Fixes in Version 3.35b (March 23, 2011):**

- Fixed a bug introduced by version 3.35, where if you run the Current Donor report under DONATION REPORTS in **Reports ⇒ Report Browser**, it crashes the program. (Running it from the menu option **Reports ⇒ Donation ⇒ Current Donor** still worked.)
- Fixed a bug introduced by version 3.35, where running **Reports ⇒ Category ⇒ Donor Category 1** or **Donor Category 2** (or running the same reports from the Report Browser) crash the program.

#### **Fixes in Version 3.35 (March 22, 2011):**

##### Changes related to Pledges

- Added a new [Pledges tab](#) to **Maintenance ⇒ Main Window Options**, which allows for more complex single-year pledging (with a start date and a pledge category) or multi-year pledging (with a start date, number of years, pledge category, schedule of year-by-year pledge amounts etc.).
- Added five new reports to the **Reports ⇒ Pledge sub-menu**, which appear only if the new pledging type is set to Multi-Year. Also added a new report, **Reports ⇒ Pledge ⇒ Current Donor Details**, for all pledging types.
- Added support for the new pledge-related fields in [Custom Reports](#), and a new Pledge Information type letter in [mail-merge letters](#) (which can also be sent to donors by [email](#)).
- Greatly updated the help topic on [Pledges in Donation](#), and added some additional help pages to reflect all of these changes.

##### Other Changes

- Added an option in both the **Receipt ⇒ Current Donor Duplicate/Corrected** and **Receipt ⇒ Duplicate/Corrected Receipt by Number menu options**, to not change the receipt status to Duplicate or Corrected. This option is to be used **only** if the original receipt has not been sent to the donor.

- Added a new menu option, **Database** ⇒ **Delete Latest Year**, for [deleting the latest year](#) of data in the database, if you have created it in error, and haven't yet entered any donations or created any receipts in that year.
- Renamed the menu option **Help** ⇒ **Help Contents** to **Contents and Index**, to make it clear you can find the Index of the Help there as well.
- Fixed a bug where a logo or signature file that is an invalid graphics file (or perhaps in some cases that is missing) can cause the program to crash when clicking the "Select Logo and Signature Images" [button](#) in **Maintenance** ⇒ **Receipt Options** or when doing certain actions in the window that comes up.
- Logo and signature images now automatically transfer with a database [moved](#) to another computer.
- Logo and signature images set on any of the computers in a [network setup](#) of DONATION (network server or network client) will automatically be picked up and used by all of the other computers in the network setup, the next time DONATION is started on those other computers.
- Changed reports, so that if you both [Sort](#) them and [Filter](#) them, the description of the Filter is added to the header of the report, rather than the description of the Sort. (I decided it was more important to know how the report's data had been restricted than how the report had been re-sorted, which is probably more directly obvious anyways.)
- Fixed a tiny annoyance when you [Filter](#) reports, namely that the filter criteria redisplayed in the header of the report would have odd capitalization.
- Re-arranged the options on the [Database menu](#), to put the options for deleting data near the bottom.
- Fixed the Help topic on [Importing Donations](#), to state that the Description field has a limit of 50 characters (it was shown as having no limit). In addition, fixed the program to correctly enforce that limit. (Previously the program incorrectly thought the limit was 80 characters, and for lengths in between 50 and 80, would give a techie error message and quit the import attempt.)
- When you are either [Importing Donors](#) or [Importing Donations](#), fixed a very small problem where text fields being imported that had quotation marks in them, which had been exported from Excel or other programs, might end up with those quotation marks being doubled in some circumstances.
- Fixed a problem where DONATION would not install on Windows XP Home edition (which fortunately very few users have!). The problem was that Windows XP Home normally cannot create folders under C:\Documents and Settings\All Users\Documents, where DONATION usually puts the [Data Directory](#) under Windows XP. When this problem occurs, DONATION will now instead put the Data Directory under C:\Documents and Settings\YourName\Application Data.
- Fixed a small bug in the **Database** ⇒ **Copy Missing Donors** [menu options](#), where if a donor being copied from one year to another had an email address, that email address was omitted in the copied record in the other year.
- Fixed a small bug in the **Letters** ⇒ **Mass Mailing** [menu option](#), that only appeared if you were using the option to export the merge data to a file instead of doing the merge in DONATION. In that case, if you were doing an Individual Donation information merge, any Appraiser Name and Appraiser Address would not be exported. And if you were doing a Gift in Kind Receipt information merge, any Donation Description, Appraiser Name and Appraiser Address would not be exported.

#### **Fixes in Version 3.34b (January 31, 2011):**

- The empty database used by new users delivered with version 3.34 was missing some new pledge-related fields in the Donor table, and as a result new Donors could not be created and saved in the database. That is now fixed.

#### **Fixes in Version 3.34 (January 30, 2011):**

- Fixed a bug when using the **Email/Print** function to [email receipts or statements](#) to donors, where if a PDF print failed, it could send a previously created PDF receipt or statement, for a different donor, to the donor.
- When [emailing](#) receipts or statements, if you have selected "Email receipts only to yourself, for testing" in the **Maintenance** ⇒ **Receipt Options** [window](#), the Name it is apparently sent to is now the donor's name, not your name, but it is still sent to your email address. (That can help you confirm that the right attached receipt or statement would be sent to the right donor, when doing this testing.)
- Added **Reports** ⇒ **Donation** ⇒ **Summary by Date and Category**, which gives a summary by category of all donations, for each date in the current year in which there were donations. This might be used to help reconcile with your accounting program.
- Created a new **Reports** ⇒ **Pledge** [sub-menu](#). Moved **Reports** ⇒ **Donor** ⇒ **Donation Info** ⇒ **Totals and Pledges by Name** to this new sub-menu, and renamed it to **Current Year Pledges and Totals**. (This is in anticipation of upcoming enhancements to pledging, which will introduce further pledge-related reports.)
- Fixed a problem where if the novaPDF printer is not installed properly, or the installation has become damaged in some way, when you go to print a report to your regular printer, you could get the error message "Error at line 11 in wf\_license\_pdf event of nvo\_pdf\_control", and the report would not print.
- Fixed a bug in the **Maintenance** ⇒ **Donor Category 1** and **Donor Category 2** [menu options](#), where a category value of "NR" alone would show as [non-receiptable](#) in this window, even though it wouldn't actually be treated that way for donors assigned that category value, when creating receipts.

#### **Fixes in Version 3.33j (January 18, 2011):**

- Fixed a bug where when the program reloads a new database, for instance after [restoring a database](#) backup, or [switching databases](#), it didn't properly reload the per-database settings visible in the **Tools** ⇒ **View Saved Settings** [window](#), under the "Current Database settings stored in the Database" heading. Instead, it just stuck with the settings from the prior database you were in. An example of a problem this could cause is with the Starting Receipt Number from the **Maintenance** ⇒ **Receipt Options** [window](#), which you might have had different values for in different database.
- The program now comes with a newer version of the 3rd-party control used for sending emails (Chilkat Mail), which could resolve problems for some users.

#### **Fixes in Version 3.33i (January 13, 2011):**

- Fixed a bug in the **Maintenance** ⇒ **Change Year** ⇒ **Previous Year** and **Next Year** [menu options](#), where they would not work if you had over 32,767 donations in the current year's data.

#### **Fixes in Version 3.33h (January 10, 2011):**



- Update the detection of Microsoft Word to work with Word XP (2002), so that the "Edit in Microsoft Word" option appears in the [mail-merge editor](#). Make a similar change for detecting the availability of Excel XP (2002), for example for editing files saved from the **Save As button** in reports.
- In the **Letters** ⇒ **Mass Mailing menu option**, if you choose the option to just export the data to a file instead of doing the mail merge, and if you have Excel installed, you will now be given an option to open the exported file in Excel.

#### **Fixes in Version 3.33g (January 10, 2011):**

- The installation program, when it was upgrading an existing installation, previously deleted the desktop icon for DONATION before the install, and recreated it after the install. In the unusual cases where there was an error during the install, this could leave you with no icon so you couldn't run the program easily. Now, it doesn't delete the icon until after a successful install, so this problem should not be able to occur.
- When you use the **Maintenance** ⇒ **Email Sending Configuration menu option**, if you are trying to configure it based on an verizon.net email address, it now gives you an option to go to Verizon's web page to determine the correct settings. (There are multiple options under Verizon, and there is no way for DONATION to detect the correct one for you.)
- When you use the **Help** ⇒ **Check for Updates menu option**, if for some reason it can't run the downloaded installation file, it now gives you detailed instructions on how to run it yourself.

#### **Fixes in Version 3.33f (January 8, 2011):**

- When using the **Email/Print** action for [emailing statements or receipts](#), if a donor in the middle of the batch to be emailed has an invalid email address that causes an error, give an option to continue on with the next one regardless. (Previously it would always stop after an error.)
- In both the **Letters** ⇒ **One Letter menu option** and the **Letters** ⇒ **Mass Mailing menu option**, when the document file (template) field is not editable because you selected "use standard filenames", you can now click into it and move through it to see the start and end if it is a long pathname. And it will always by default be shown scrolled to its end, so you can see the filename part.
- Make the filename being viewed or editing in the [mail merge editor](#) easier to read.
- The [mail merge field](#) "SignatoryName" is now allowed in all types of merges (previously it was only allowed in Donation Information and Receipt Information merges).
- When [printing envelopes](#) for donors or receipts, change the margins from 0.25" to 0.5", in the hopes that it will fix a problem some users have where after every envelope, it prints a blank one.

#### **Fixes in Version 3.33e (January 2, 2011):**

- In both the **Database** ⇒ **Import Donors menu option** and the **Database** ⇒ **Import Donations menu option**, allow Excel files (\*.xls or \*.xlsx) to be imported, as well as the tab-separated text files that were previously the only option.
- Show page numbers on **Reports** ⇒ **Donation** ⇒ **Current Donor**, and allow its details section to be exported with the "Raw Unformatted Data" option of the **Save As button's window**.
- Fixed a minor and subtle bug that only affects users in the USA, running either **Reports** ⇒ **Donation** ⇒ **Summary by Paid By** or **Reports** ⇒ **One Date Donation** ⇒ **Summary**. If you had one or more donors with actual check numbers entered into the Check # / Paid By field

for their donations, and one or more other donors with "Check" entered into that field, then in the summaries by Paid By in those reports, there would be two lines for "Check", rather than the expected one line.

See Also: [Revision History - Latest Version](#), [Revision History 2007 to 2010](#), [Revision History - Earlier Versions](#)

## 26.4 Revision History 2007 to 2010

See Also: [Revision History - Latest Version](#), [Revision History 2015 to 2018](#), [Revision History 2011 to 2014](#), [Revision History - Earlier Versions](#)

### **Fixes in Version 3.33d (December 23, 2010):**

- In the **Database ⇒ Import Donations** [menu option](#), added checkbox options to adjust the dates in the file to be imported to all be in either the current month or the previous month. That way, if you are using this to import recurring monthly donations, you don't have to edit the file and adjust the dates each time.
- Allow dollar signs in the amount fields you are importing with **Database ⇒ Import Donations**.

### **Fixes in Version 3.33c (December 21, 2010):**

- Fixed a bug introduced by version 3.33b, where using the **Email/Print** button to email a built-in receipt or statement report would cause an error message (although the email actually worked).

### **Fixes in Version 3.33b (December 20, 2010):**

- You can now double-click on [backup files](#) (for example DONATION4.DB.GBK) or [emailed backup files](#) (for example DONATION4.DB.S4B), and if DONATION isn't open, DONATION will start and you will be prompted to restore that backup.
- Completely replaced the features of the **Save As** [button](#) on the report-viewing window. It now brings up a new window with clearer choices, and some new options like displaying your saved file in an appropriate program (such as Excel) after saving it, and sending it by email to someone.
- Added information in the [Network Versions](#) of DONATION help page, explaining how they can also be used over the [Internet](#) (for example with the Network Server version of DONATION on a computer in your office, and the Network Client version at home).
- Added a new help page on [Multiple User Options](#) for DONATION, listing three options: multiple Standalone or Lite installs ([copying](#) the database around), [Network Versions](#), or remote access.
- Added a question if you use **Receipt ⇒ All Donors** prior to the year-end, asking whether you really want to do that, since usually that menu option is only used once per year (if at all), after the year end. The same is done with **Receipt ⇒ Filtered Donors**, if the only filter criterion is on the donation amount. (Other filtered receipt options might reasonably be used prior to the year-end, for special campaigns.)
- If you close a receipt-viewing window that is displaying newly created receipts, without printing, emailing or saving the receipt(s) to a PDF file, previously the program would ask you whether you wanted to save the receipts to the database anyways. This is no longer asked, and the receipts are now never saved to the database in this case. (Answering Yes to save

the receipts to the database was almost always an error, and caused many tech support problems!)

- Made a small improvement in the installation programs, when you are upgrading an existing installation. Previously, if you had manually updated your desktop icon for DONATION to have a [shortcut key](#) to start it, whenever you upgraded that shortcut key would get lost. Now it is retained.

#### **Fixes in Version 3.33 (December 6, 2010):**

- Moved the One Date reports, previously under **Reports ⇒ Donation**, to a new [sub-menu](#), **Reports ⇒ One Date Donation**.
- Added two new reports under **Reports ⇒ One Date Donation: Details and Summary**, and **Details with Member/Envelope # and Summary**. Each combine the respective Details report with the summary by category part of the Summary report, on one page if they both fit. (The three previously existing individual Details or Summary reports are also all still available.)
- In **Reports ⇒ One Date Donation ⇒ Details** and **Details with Member/Envelope #**, added a "Switch to Summary Report" button at the bottom. In **Reports ⇒ One Date Donation ⇒ Summary**, added a "Switch to Details Report" button at the bottom. These buttons switch between these sets of reports. ("Switch to Details Report" switches to **Details with Member/Envelope #** if you have selected to show the Member/Envelope # field in the Donor Details tab of the **Maintenance ⇒ Main Window Options** [window](#), and to just **Details** if you are not showing the Member/Envelope # field.)
- Added a new [report](#), **Reports ⇒ Donation ⇒ All Donations ⇒ Sort by Amount**.
- Fixed a bug in the Standalone version full installation program (doninst.exe) that in very unusual circumstances would give an incorrect error message that you were trying to upgrade from a version prior to version 2.30, and not let you continue the installation.
- Fixed a bug where you are [backing up](#) to a USB memory key that has insufficient free disk space to hold the backup, and it says the backup was successful, but in fact it wasn't. (Fortunately given the capacity of USB memory keys, and the usually very small size of DONATION database backups, this would have been a very unusual occurrence!)

#### **Fixes in Version 3.32b (November 4, 2010):**

- Fixed a problem in **Help ⇒ Check for Updates**, that seemed to only happen on Windows 7 (or perhaps only on 64-bit computers, or both). After it prompted that it needed to exit the program before starting a downloaded update installer, you would get an error message saying that it could not start the installer. Unfortunately, this fix may only take effect on the upgrade after this one, because the fix is in the program, not the installer, and thus you need to have a fixed program before the problem goes away!

#### **Fixes in Version 3.32 (November 3, 2010):**

- Added a menu option, **Help ⇒ Move DONATION to Another Computer**, which takes you to the help topic [Move the Program from One Computer to Another](#). (This is the most common technical support question we receive!)
- Added the [menu option](#) **Backup/Restore ⇒ Restore Non-Backup Database**, for the unusual case when you need to restore an actual copy of the database file (usually named DONATION4.DB) rather than a database backup (usually name DONATION4.DB.GBK).
- If you have multiple databases (created with the **Database ⇒ Switch Databases** [menu option](#)), after you create any backup it will remind you that you need to back up your other

database(s) independently, by switching to them and backing them up. (A backup only backs up the database you are currently in.)

- In the Help page on [Using a Logo and Signature Bitmap on your Receipts](#), added a section on how to get inexpensive help editing your logo and signature bitmaps, if you are not able to do so yourself.
- Added a trick in the [Email Sending Configuration](#) windows: if you set the SMTP Sever in the 2nd window to "NONE" (without the quotes) and click **OK**, then when you go back that menu option again, it will take you back to the 1st window, for the program to infer your settings from either your default email program or your email address.
- Fixed a bug in the **Database** ⇒ **Import Donors** [menu option](#), where if the file to be imported contains quoted fields that are the maximum field length (for example 30-character First or Last Name fields), the names would be truncated because the quotes were being counted as part of the length.
- Fixed issues in both the **Database** ⇒ **Import Donors** [menu option](#) and the **Database** ⇒ **Import Donations** [menu option](#), where if you had saved the file to be imported from Excel, and Excel was still open, those windows could fail to open the import file.
- Fixed a bug where if the First or Last Name fields were filled in to their maximum length (30), and contained accented characters, the Donor List would stop loading correctly on subsequent runs of DONATION, with an error message.
- Fixed something more fully, that was supposed to be fixed in version 3.31 but the fix only sometimes worked: In some versions of Windows, some PDF printing of reports and built-in receipts may not work unless you run DONATION as an Administrator. If a PDF print fails, you may be given a message to exit DONATION and re-run it as an Administrator, to resolve this problem.
- Fixed a bug when using the **Email/Print** [button](#) in receipts, where it could give you an erroneous error message that it couldn't create the Report.pdf file, even though it actually created the Receipt.pdf file it was supposed to create successfully. (It still sent the email with the correct Receipt.pdf file attached successfully, despite the error message.)

#### **Fixes in Version 3.31c (September 1, 2010):**

- Fixed a bug in the installation program for the [Network Server](#) version, that caused it to fail to install an empty database on a first installation, as a result of which you could not use the program after the install.

#### **Fixes in Version 3.31b (August 28, 2010):**

- Fixed a bug that was occurring to a few users of DONATION who were using Windows XP, where trying to run the program caused their computer to reboot.
- In the [Network Server](#) version of DONATION only, added the **Tools** ⇒ **Network Client Information** menu option, which displays the information needed to successfully install the Network Client version of DONATION on other computers in your network.

#### **Fixes in Version 3.31 (August 5, 2010):**

- Changed the saving to PDF files so that it doesn't encrypt/protect the PDF file from modification unless it is a receipt or is a statement being emailed to donors. (Previously all PDF files created by DONATION were encrypted.) This may solve a problem that a few users are having where PDF printing doesn't work.

- The program now uses a new version of the novaPDF PDF-printing software (version 7.1 instead of version 5.5), which also may solve a problem that a few users are having where PDF printing doesn't work.
- In some versions of Windows, some PDF printing of reports and built-in receipts may not work unless you run DONATION as an Administrator. If a PDF print fails, you may be given a message to exit DONATION and re-run it as an Administrator, to resolve this problem. Another option (that does not require running DONATION as an Administrator) is to select to Print the report or receipt(s), selecting the "novaPDF v7 for DONATION" printer to print to.
- Fixed a bug, where if you logged in to DONATION using the [Limited User Password](#), and you backed up the database, you received an error message after that, and the program exited. (You could start it again after that, and the backup was successful.)
- Now if you are using the Limited User Password, you can no longer use the **Database** ⇒ **Switch Databases** menu option. (It could cause complicated problems, that would have been hard to fix, and seems very unlikely to be required by limited users.)
- Made a small fix that may prevent a crash during mail merges that one user was experiencing, with the message "Null object reference at line 3 in function of\_focus of object u\_web\_browser".
- Fixed a bug where you use **Maintenance** ⇒ **Change Year** ⇒ **Previous Year**, and the default date for new donations stays as the last date used in the year you just switched from, allowing you to save donations with a date in the wrong year. (If you used that menu option several times in a row, you could even end up saving donations with a date several years forward.)
- Fixed a bug where if you selected **Save As** from the window displaying a report, and it couldn't save to the specified directory or filename, it didn't tell you that the save failed. Now it does.
- Fixed a bug where if you selected **Save PDF** from a window display a report or a mail-merge letter, and it can't save to the specified directory or filename, various confusing error messages could occur, and the program could hang for a while or crash. Now simpler error messages are used.

#### **Fixes in Version 3.30c (June 22, 2010):**

- Fixed a bug (which was worked around, but not prevented, in version 3.30b) where an initial install of the program on a computer can start you out working on the year 0, instead of the current year (such as 2010).

#### **Fixes in Version 3.30b (June 21, 2010):**

- Fixed a problem in **Help** ⇒ **Check for Updates**, that seemed to only happen on Windows 7 (or perhaps only on 64-bit computers, or both). After it prompted that it needed to exit the program before starting a downloaded update installer, it would exit the program, but never start the installer. Unfortunately, this fix may only take effect on the upgrade after this one, because the fix is in the program, not the installer, and thus you need to have a fixed program before the problem goes away!
- For users of the [Network Client](#) version of DONATION, if the database on the Network Server version's computer can't be opened, because the Network Client thinks it is in a location that is not correct, give the user an option to correct that location.
- Fixed a bug where [Limited Users](#) could use the Report Browser, and thus see all reports and all data in the program. Also, prevent Limited Users from using the new [Tools menu](#), which is not a security issue per se, but they just don't need those functions.



- Handled a bug where during your first program startup, you can end up with the year set to 0 (rather than the current year, for example 2010) and the program allows you to enter data for the year 0. Now the program will exit if it observes that the year has been set to 0, and should prompt you normally for your startup information the next time you start it.

### **Fixes in Version 3.30 (June 10, 2010):**

#### Changes directly or indirectly related to no longer needing to run DONATION as a Windows Administrator:

- Made a lot of small changes to allow the program to not require being run with Windows Administrator privileges on Windows Vista, Windows 7 or other versions of Windows with Microsoft's User Account Control feature in them. This saves on having to click on a User Account Control "Allow" button to allow it to run, every time you start it, and better conforms to Microsoft guidelines for applications. (It also no longer requires being run as an Administrator on Windows XP.)
- Moved a lot of data files from various places under the standard installation folder (usually C:\Program Files\Donation) to a new [data directory](#) that is not under C:\Program Files (where non-Administrator programs may not modify files).
- The program now stores its settings in various different places. (They used to almost all be in the Local Machine registry, which non-Administrator programs may not modify.) Many settings, such as those in **Maintenance** ⇒ **Main Window Options**, are now stored in the database, which means they go with it when the database is backed up from one computer and restored on another. It also means that if you have two databases for two organizations, they can have independent settings on that window.

#### Other improvements and bug fixes:

- All "statement" reports and mail merges can now be sent by email to donors who have email addresses, just like the receipts. This includes **Reports** ⇒ **Donation** ⇒ **Details, One Page per Donor** and **Category Totals, One Page per Donor**, and Total Donations information mail merges. See [Statements and Receipts](#) and [Emailing Receipts and Statements](#) for details.
- The program is now much more flexible about the names and locations of [logo and signature](#) bitmap files for your receipts and letters, allowing you to select them on a window you reach from the **Maintenance** ⇒ **Receipt Options** [window](#), and allowing them to have any name and standard bitmap filename extension (for example BMP, GIF or JPG). Also, you can specify different logo and signature bitmaps for different organizations/databases, if you have multiple databases on the same computer.
- You can now edit the list of [Paid By values](#) for the Cheque # / Paid By field's drop-down list for the Donations, by using a new **Maintenance** ⇒ **Donation Paid By Values** menu option.
- In the windows for **Letters** ⇒ **One Letter** and **Letters** ⇒ **Mass Mailing**, removed the final sections for specifying whether or not to use a standard save pathname for the merged file, and for specifying an alternate save pathname if you aren't using the standard one, and for editing a previously saved merged file. Those sections were just confusing and not particularly useful. Now the standard save pathname (the letter file name with "\_save" added before the ".htm" extension) is always used.
- Also in the mail merge windows, added a new OutstandingAmount [field](#) to the Donor Information and Total Donations Information merge options, which is filled in with the donor's annual Pledge amount (or 0, if there is no pledge) minus the Total Amount donated.



- Created a new **Tools** menu, with new options [Explore Data Directory](#) (which opens a Windows Explorer window in the new data directory) and [View Saved Settings](#) (which displays all settings saved by the program, and where they are stored).
- Moved the **Help** ⇒ **Register by Email** [menu option](#) to the new **Tools** menu.
- Made a number of small improvements to the installation program. In particular, if the program has been copied to a new computer (instead of installed there properly, as explained in the Help topic [Move the Program from One Computer to Another](#)), it now offers an option to delete and recreate the license file if the current license key is out of date, which previously would have prevented the install from completing.
- Fixed a small typo in the French and bilingual receipts: "d'enterprise" was corrected to be "d'entreprise".
- Renamed **Help** ⇒ **DONATION on the Web** to **Help** ⇒ **Software4Nonprofits Web Site**, for clarity.
- Changed the installation program to always write a log file C:\Windows\DONATIONSetupLog.txt, which can be used to diagnose any problems that come up during an installation.
- Fixed a bug in **Reports** ⇒ **Custom Report**, where if you picked Sum(Total Amount) or Sum(Eligible Amount), or both, and also at least one of the Receipt fields, it generated incorrect SQL that gave an error message when you tried to run it.
- Added a new Help topic, [Pledges in DONATION](#), to explain various aspects and limitations of using pledges in the program.
- Fixed a bug in **Reports** ⇒ **Donation** ⇒ **Details, One Page per Donor**, where donations that had longish Descriptions could have part of those descriptions cut off at the right.
- Fixed a small bug in the three **Maintenance** menu options for editing donor and donation categories, where it would allow you to save a category description consisting only of one or more spaces.

#### **Fixes in Version 3.23j (April 2, 2010):**

- Fixed a bug in that affected a few users of mail-merge letters, where the merge [field](#) «Today» displayed as "January 1, 1900" in the merged letters. (This only happened if in Control Panel's Regional and Language Options, in the Date tab of the Customize window, your Short date format had a different order of elements from your Long date format. For instance, if your Short date format was "dd/MM/yy", and your Long date format was "MMMM d, yyyy".)

#### **Fixes in Version 3.23i (March 21, 2010):**

- Fixed a bug in **Reports** ⇒ **Donor** ⇒ **Envelopes** and **Reports** ⇒ **Receipt** ⇒ **Envelopes**, where if you chose the option to include a logo on the [envelopes](#), the logo was displayed with the wrong dimensions (it was squished horizontally to about 1/2 of the correct width).

#### **Fixes in Version 3.23h (March 19, 2010):**

- Fixed a tiny problem in **Reports** ⇒ **Donation** ⇒ **Receipted**, where the total of the Amount column, at the bottom of the report, didn't quite line up properly with the figures above it in the Amount column.
- Fixed a problem introduced by version 3.23, where in the [editor](#) for mail-merge letters and receipts, the **Actions** ⇒ **Edit in Microsoft Word** menu option and toolbar button did not always work reliably. (Word would come up, but the file you were editing in the mail merge editor might not appear in it.)

**Fixes in Version 3.23g (February 23, 2010):**

- Fixed a problem when using the built-in receipts for Quebec (French-only or bilingual) where if you selected either "Details only, no Summary" or "Summary only, no Details" in the **Maintenance** ⇒ **Receipt Options** [window](#), a blank page would often be printed after each receipt. Also, this change allows for more individual donations in the Details section, or categories with donations in the Summary section, before the receipt will go onto a 2nd page.
- Made two corrections to the French in the built-in and mail-merge receipts for Quebec (French-only or Bilingual): "N° de reçu" instead of "N° de série", and "N° de l'enveloppe" instead of "N° de enveloppe". (The first of these changes only needed to be made in the mail-merge receipts, it was already that way in the built-in ones.) Note: To get these changes to the mail-merge receipts, you either have to make them yourself (the best choice if you have already edited them), or if you have never edited them, delete the receipt files receipts\_merge\_bilingual.htm, receipts\_merge\_bilingual\_simple.htm, receipts\_gik\_merge\_bilingual.htm, receipts\_merge\_french.htm, receipts\_merge\_french\_simple.htm, and receipts\_gik\_merge\_french.htm before upgrading to this version. Those letters files are found in the letters folder under the DONATION installation folder, generally C:\Program Files\Donation\Letters.
- Made some small corrections to the documentation for the **Database** ⇒ **Import All Data** [menu option](#).
- Fixed a bug where if you have a huge screen resolution (bigger than 1280x800), and you maximize the DONATION window, Member/Envelope Numbers, or part of them, can appear at the right in the Donor List.

**Fixes in Version 3.23f (February 19, 2010):**

- When you use the **Help** ⇒ **Check for Updates** [window](#), if you have used it before for the same version but for some reason not completed the installation successfully, it will now notice that the installation file has been downloaded before, and give you an option to just use that file, rather than downloading it again.
- Fixed a bug introduced in version 3.23, where **Reports** ⇒ **Category** ⇒ **Donor Category 1** and **Donor Category 2** cause the program to crash.
- In the Lite version of the program, if you changed the Organization Name in the **Maintenance** ⇒ **Organization Info** [window](#), you were getting an inappropriate message about needing to update your license key after that change. Removed that message, because the Lite version doesn't need license keys.

**Fixes in Version 3.23e (February 15, 2010):**

- In the **Database** ⇒ **Import Donors** [window](#), changed the name of the Member/Envelope # field from being displayed as "Member Number" to the clearer "Member/Env. #". Also fixed a bug, where if that field was imported, and it was later in the list of fields to be imported than the "Addr2 (Merge 2 Fields)" or "Addr3 (Merge 2 Fields)" field, the import would fail with inappropriate error messages.
- Fixed a bug in the **Help** ⇒ **Register by Email** [menu option](#), where if you had no Address Line 3 or no Phone in the **Maintenance** ⇒ **Organization Info** window, either sending the registration would result in an error message, or it would be sent, but it would be empty.
- Fixed another bug in that same menu option, where if you were a Lite version user, or a paid version user who registered before setting up their [email sending configuration](#) with

**Maintenance ⇒ Email Sending Configuration**, it would say that you would receive an immediate automated acknowledgement of your registration, but you never received that.

- The default directory for the first backup you ever do with the program was changed again (further to the change in version 3.23d), from the Cooperstock Software\Donation subdirectory of the Windows All Users Application Data directory, to the same subdirectory of the Windows All Users Documents directory. (This should only be relevant for users who have never made a backup on the current computer before, and in any case, the backup can be changed to be in any desired drive or directory.) This is better than the directory used in version 3.23d, because that was a hidden directory by default.

#### **Fixes in Version 3.23d (February 11, 2010):**

- When [entering new donations](#) (or editing existing ones), you now cannot enter an Eligible Amount that is the same as the Total Amount. If all of a donation is eligible for a tax deduction, you should only enter its amount in the Total Amount field, when both of the Amount fields are displayed.
- Fixed a couple of small bugs in **Database ⇒ Import Donors**. First, when importing either the "Name: First Last" or the "Name: Last,First" fields, if there is no data for that field, the First Name field would end up looking empty, but not really be empty, so if you tried editing that Donor record, you would get a confusing message saying "If you are entering either a last or a first name, please enter both of them." (If you get this bug, fill in both name fields with anything, Save the donor, then remove those name field entries, and Save it again.) The second bug was that if you were using the "Addr2 (Merge 2 Fields)" or "Addr3 (Merge 2 Fields)" fields, and only one of those two fields to be merged was filled in, the resulting merged address field would be empty, rather than containing the one field it should have contained.
- The default directory for the first backup you ever do with the program was changed, from the Cooperstock Software\Donation subdirectory of the current logged-in Windows user's Windows Application Data directory, to the same subdirectory of the Windows All Users Application Data directory. (This should only be relevant for users who have never made a backup on the current computer before, and in any case, the backup can be changed to be in any desired drive or directory.)

#### **Fixes in Version 3.23c (February 10, 2010):**

- Allowed more options for marking a donor or donation as [Non-Receiptable](#): if either donor category or the donation category is exactly "Non-Receiptable", or starts with "NR ", or ends with " NR" (abbreviations for "Non-Receiptable"), that donor or donation respectively will be Non-Receiptable, i.e. will never be included in an official receipt created with the Receipt menu options. This change to allow donation categories to mark donations as Non-Receiptable allows you to still use the Cheque # / Paid By field normally. (Previously you had to select the value "Non-Receiptable" or "Pre-Receiptable" in that field to mark an individual donation as Non-Receiptable.)
- In the editing windows for the donor and donation [categories](#), added a display-only field "Receiptable" beside each Category name, to show whether or not that category is Receiptable or Non-Receiptable. It shows a check mark for Receiptable, or an "X" for Non-Receiptable. This is based on them being Non-Receiptable if they contain exactly "Non-Receiptable", or start with "NR ", or end with " NR".
- Simplified the process for the **Backup/Restore ⇒ Restore Old Database** menu option, in the case where DONATION version 2.70b or earlier was never installed on the same computer, and thus the database software required to restore an old database (filename

DONATION3.DB) is not present. Before, it prompted you to go to the DOWNLOAD page on the DONATION web site to download and install a required file, to make this action possible. Now, it downloads that file for you (and it is a new, smaller file, only 3MB), and runs the install for you.

#### **Fixes in Version 3.23b (February 5, 2010):**

- Made a number of smallish fixes to the **Reports** ⇒ **Custom Report** [window](#), the largest of which is allowing you to force the report to prompt for a single donation date, a range of donation dates, or a range of donation dates and optionally a donation category.
- Connected to that, in **Database** ⇒ **SQL Select** (which is used by **Reports** ⇒ **Custom Report** to display the report), provided for various [arguments](#) for prompting for a single donation date, a range of donation dates, or a range of donation dates and optionally a donation category before displaying the report.
- Fixed a bug in the **Help** ⇒ **Register by Email** [window](#), where if there was no email address stored in the program yet, it wouldn't allow editing of that field, so the registration would be sent with a blank email address. Also, validate that the email address field has been filled in with a valid email address.

#### **Fixes in Version 3.23 (January 29, 2010):**

- Put a fix into the installation program, which seems to fix a problem some users with 64-bit computers and Windows Vista or Windows 7 were having, where running reports or receipts could crash DONATION, and a reboot of their computer was required to fix it.
- When viewing [receipts created with mail merge](#), the editor now has a **File** ⇒ **Email/Print** menu option and corresponding toolbar button, allowing you to [email those receipts](#) to those donors who have email addresses, and optionally print the rest. (The was previously only available for the built-in receipts, not the mail merge ones.)
- Moved all backup and restore menu options from the **Database** menu to a new **Backup/Restore** menu, because the **Database** menu was getting too crowded!
- Added a new **Database** ⇒ **Split Donor** [menu option](#), for making a duplicate of a donor record, in order to spit it (for example into separate records for spouses).
- Reorganized the **Maintenance** ⇒ **Receipt Options** [window](#) into more logical groupings, and made it disable fields that are not relevant if you have selected to use mail merge receipts. Also, added buttons for editing the template file for mail merge receipts, and mail merge gift in kind receipts, if you are using mail merge receipts. (This saves having to go to **Letters** ⇒ **One Letter** to do that.)
- Changed **Database** ⇒ **Delete Old Data** so that it prompts for the last year of data to be deleted, rather than always deleting up to the 3rd-last year of data in the database.
- In the [editor](#) for mail-merge letters and receipts, added a menu option and toolbar button for inserting an HTML non-breaking space.
- In that same editor, show the **Actions** menu option for Edit in Microsoft Word only if Word is installed. Added further **Actions** menu options and toolbar buttons for Edit in Dreamweaver, Edit in Microsoft Expression Web, and Edit in Microsoft FrontPage (all of which are HTML editors), which appear only if their respective programs are installed.
- In that same editor, if you edit the document with an external editor using any of the **Actions** menu options and make changes in that external editor, then when you return to the internal editor in DONATION, you will be prompted to reload the document to see the changes.

- Added a **Help** button in the window prompting for a range of receipt numbers for the **Receipt** ⇒ **Reprint Range** menu option. Also added a **Help** button in the window prompting for a range of receipt numbers when you are in **Letters** ⇒ **Mass Mailing**, you select the Receipt Information option, and click the **Merge** button.
- Improved some of the messages that come up if you try to create receipts but there are no unreceipted donations, to clarify that you can reprint those receipts with the **Receipt** ⇒ **Reprint Range** menu option.
- In the Evaluation version of the paid versions of DONATION (i.e. before you get your license key), it used to be that the **Receipt** [menu options](#) other than **Current Donor Sample** were disabled (greyed out) so you could not use them, because that is the limitation of the Evaluation version. Now, the options are enabled, but if you try to use them, they give a message explaining that they are not available until you pay and are licensed. **Current Donor Sample** still works, as before. This does not apply to the Lite version, which does not require licenses, but has other limitations on which **Receipt** menu options are available.
- Added some details to the help topic on [Validating your Database](#) on how to fix things, in the extremely unlikely event of a validation error. Also, in that event, the program will prompt you to read that help topic.

#### **Fixes in Version 3.22f (January 7, 2010):**

- Fixed a bug introduced by version 3.22c, where license key requests for organizations with accented characters in their name would mess up those characters.
- Don't allow Canadian organizations (including Quebec) or Australian DGR organizations, as specified on the "Receipt Style For" drop-down list on the **Maintenance** ⇒ **Receipt Options** [window](#), to issue official receipts with the **Receipt** menu options unless they have filled in the Charitable Number (ABN for Australian DGR organizations) in the appropriate field in the **Maintenance** ⇒ **Organization Info** [window](#).

#### **Fixes in Version 3.22e (January 6, 2010):**

- Made two corrections to the French in the built-in and mail-merge receipts for Quebec (French-only or Bilingual): "Agence du revenu du Canada" instead of "l'Agence du revenu du Canada", and "Sommaire par catégorie" instead of "Relève par catégorie". Note: To get these changes to the mail-merge receipts, you either have to make them yourself (the best choice if you have already edited them), or if you have never edited them, delete the receipt files receipts\_merge\_bilingual.htm, receipts\_merge\_bilingual\_simple.htm, receipts\_gik\_merge\_bilingual.htm, receipts\_merge\_french.htm, receipts\_merge\_french\_simple.htm, and receipts\_gik\_merge\_french.htm before upgrading to this version. Those letters files are found in the letters folder under the DONATION installation folder, generally C:\Program Files\Donation\Letters.

#### **Fixes in Version 3.22d (January 5, 2010):**

- Made a number of enhancements to the **Database** ⇒ **Import Donors** [window](#), including adding the fields "Name: First Last" and "Name: Last, First", which allow you to import the First Name and Last Name fields into DONATION from one merged field in the input file, and the fields "Addr2 (Merge 2 Fields)" and "Addr3 (Merge 2s Fields)", which allow you to merge two fields in the input file (containing the city and the state/province) into one Address field in DONATION. Also, double-clicking on a field in the Donor Fields or Fields to Import list transfers that field from one list to the other. And settings in the window (for



example selected fields, filename to import) are saved and restored between uses of this window.

#### **Fixes in Version 3.22c (January 2, 2010):**

- Fixed a bug where Lite version users couldn't use the new [menu option](#) **Help ⇒ Register by Email**, because they couldn't use the [menu option](#) **Maintenance ⇒ Email Sending Configuration**. Now, users (of any version) don't have to do that configuration before registering by email, though it will still use that configuration if it's available. Otherwise, it uses an email sending form, that sends using a form on the DONATION web site.

#### **Fixes in Version 3.22b (December 22, 2009):**

- Fixed a bug that allowed DONATION to be run on Windows Vista or Windows 7 as a non-Administrator user in some unusual cases, which could cause problems. Added a Help page on [Running as an Administrator](#), to explain the issues about this.

#### **Fixes in Version 3.22 (December 19, 2009):**

- Renamed the **File ⇒ One Date Donation Entry** [menu option](#) to **One Date Batch Entry**, for clarity. (It is mostly used for entering a church collection or offering, when there are many donations on one date, more quickly.)
- Whenever you move to a new donor on the main window, for example by navigating in the Donor List, an "empty" line (with just the default Date, Category and optionally Cheque # / Paid By filled in) is now automatically displayed in the Donation details area for that donor. This means you no longer have to click a button (previously **New (F2)**) to enter a new donation on the main window - you can just click into that empty line and change the date if necessary, enter the amount, etc.
- Because of the previous change, removed the **New (F2)** button above the donation details area, since it is not needed for [entering new donations](#).
- Where the **New (F2)** button used to be, there is a new button, **Batch Entry**, that does the same thing as **File ⇒ One Date Batch Entry**. (It was added here to make the presence of that option more obvious, because it seems that many churches weren't finding this option, which can greatly speed up their weekly data entry.)
- Removed the **New** sub-menu of the **File** [menu](#), which had options **Donor (F3)** and **Donation (F2)**. Instead, there are two new options directly on the **File** menu: **New Donor (F3)**, and **Edit New Donation (F2)**. Using the 2nd of those options, or pressing **F2**, just moves the cursor into the empty row for a new donation for the current donor. (Using this is not required, but speeds things up for those who prefer using the keyboard to the mouse.)
- On the Donations tab of the **Maintenance ⇒ Main Window Options** [window](#), added two new options. The first, **Sort Order**, lets you pick between Oldest to Newest (the only option in previous versions), and Newest to Oldest. Oldest to Newest means that earlier donations are higher up in the list, and the new empty donation that is automatically added is at the bottom of the list. Newest to Oldest means that later donations are higher up in the list, and the new empty donation is at the top. The second new option, **Cursor Field after F2**, lets you pick between Date and Amount. This determines which donation field the cursor moves to when you press the **F2** key. (Previous versions always went to the Date field, but that could waste time if you were entering a number of donations for the same date on the main window, since once you set the date on the first donation, it would stay set.)
- Added the [menu option](#) **Help ⇒ Register by Email**, which gives another way to get onto the program's mailing list (required before paying, requesting a license key or requesting an



evaluation extension). You can also do that by using the registration form on the program's web site. This method uses information from the Organization Info window, though, and so saves some retyping.

- When you create [mailing labels](#), the reports window that displays them has an additional button, **Margins**, for adjusting the print margins, in case they are not quite lined up correctly on your printer.
- For Lite version users, the window that comes up when you encounter a feature that is not supported in that version now includes another button, to display the Help for the current feature that you were trying to use that is not supported. This can help you understand what you are missing.
- Removed the option of importing dBase files from the **Database ⇒ Import Donors** [window](#), since pretty much nobody is using dBase files these days.
- The installation programs now prompt you to reboot your computer after installing on 64-bit computers running Windows Vista or Windows 7, because it seems that if you don't do that, running reports or receipts after the install can cause DONATION to crash. (Some other systems may also encounter this problem, but it doesn't seem consistent enough that the installation program should force a reboot.)

#### **Fixes in Version 3.21b (December 6, 2009):**

- Don't allow the program to run if it has somehow been upgraded with a version that was created after the support and upgrades expiry date in the license key file. (Normally there should be no way for this to happen, but it can happen if you switch to the Lite version then back to the full paid version.)

#### **Fixes in Version 3.21 (December 4, 2009):**

- This version was created with a new version of the development environment used to create DONATION, which is called PowerBuilder. It was previously created with PowerBuilder version 10.2; now it is version 11.5. This may resolve some problems where some users with Windows Vista found that creating reports would crash the program. (This is usually easily fixed by Restarting their computer.)
- There is now a free Lite version of DONATION available, with more limited features.
- Added the Email field to the fields that can be merged into [mail-merge](#) letters and receipts.
- In the [One Date Donation Entry](#) window, used by churches for quick entry of a Sunday (or other day) collection, the **Enter** key no longer does a **Save**. Instead, if you are in the Amount column, it moves down to the next donor's Amount column.
- In the **Database ⇒ Import Donations** [menu option](#), you can now optionally import the Eligible Amount and Description fields, which previously could not be imported. Also, this window now saves and restores the settings you used in it the last time it was used.
- In **Reports ⇒ Donation ⇒ One Date Details with Member / Envelope #**, there are now two checksums at the bottom: "Checksum of Unique Member / Envelope #s" (which was there before, just called "Member / Envelope # Checksum") and the new "Checksum of Member / Envelope #s, including splits". This allows for different churches doing their checksum in two different ways.
- When you are editing the Donation Date field on the main window, pressing the "T" key on your keyboard changes it to the current date, as long as that is in the current year you are working on. (This is similar to a feature in Quicken, QuickBooks and perhaps other accounting programs.)

- The installation program now checks whether the DONATION program itself is running during the install, and prompts to be allowed to close it. (The install cannot be completed successfully, without a reboot of your computer, if DONATION is running at the same time.)
- Both **Reports ⇒ Donor ⇒ Envelopes** and **Reports ⇒ Receipt ⇒ Envelopes** now include a reversed\_name\_upper\_case field invisibly on the reports. They have always been implicitly sorted on that field, and now they can also be filtered on that, for example to resume printing if a print job of labels stops part way through. If they stopped after, say, "Dan Cooperstock", the filter expression to resume after that label would be:  

```
reversed_name_upper_case > "COOPERSTOCK, DAN"
```
- When you send an email to a donor, by right-clicking on their email address in the Donor Details area of the main window and picking **Send Email** from the popup window, there used to be a limit of 1,000 characters in the body of that email, which is less than one page of text. That has been increased to 20,000 characters, which should be sufficient for any reasonable usage!
- Fixed a bug, where right-clicking on the Description column in the Donations area on the main window would bring up the popup menu with the Edit Appraiser option, even when the "Dropdown arrow on the Description Field, for editing the Appraiser" checkbox on the Donations tab of the **Maintenance ⇒ Main Window Options** window was not checked. (That popup should only appear on a right click when that checkbox **is** checked.)
- The program now doesn't allow entering a donation on the main window that is set to be a Gift in Kind, but has no Description.
- Fixed a tiny bug that only occurred in Windows 7, where in the mail merge letter editor, the drop-down lists for the font name and font size would sort of blink.
- Fixed a bug where the **Email/Print** button was visible in the report-viewing window when you created a report with either **Reports ⇒ Custom Report** or **Database ⇒ SQL Select**, when it shouldn't have been visible, and it crashed the program if you used it. Currently that button should only be visible for receipts.

#### **Fixes in Version 3.20b (October 4, 2009):**

- Fixed a bug introduced in version 3.20: when viewing reports created with either **Reports ⇒ Custom Report** or **Database ⇒ SQL Select**, the **Filter** button was disabled. (It is now enabled in those cases, as it should be.)
- When using the [menu option Maintenance ⇒ Email Sending Configuration](#), and using its first window to configure an @yahoo.com email address based on the standard settings for it, the program now asks the user whether it's OK to use those settings, because they require the purchase of a paid Yahoo Mail Plus account. (Note: As of 2016, this appears to no longer be a requirement.)

#### **Fixes in Version 3.20 (September 30, 2009):**

- Split up the **Maintenance ⇒ Main Window Options** [window](#) to have three tabs: Donor Details, Donations, and Limited Users, to make room for more options in each category.
- On the Donor Details tab of that window, added options for default values of Address Line 2, Address Line 3, and Postal Code in [new donors](#). On the Donations tab, added an option for Default Paid By (a default for the Cheque # / Paid By column in [new donations](#)).
- Added the [menu option Maintenance ⇒ Email Sending Configuration](#), which allows you to set up how to send emails from the DONATION program.
- Added the menu options **Database ⇒ Email Backup**, for [sending a backup to yourself or someone else by email](#) (as an attachment), and **Database ⇒ Restore Emailed Backup**, for [restoring a backup database that you saved from the attachment in such an email](#).

- Added an **Email/Print** button to the receipt-viewing window for standard (not mail-merged) receipts, for [emailing the receipts](#) to donors as PDF attachments, assuming the donors have email addresses. (For those donors without email addresses, there is an option to instead print their receipts when you click this button.)
- When sending emails to request a license key or an evaluation extension, improved some of the logic that detects what your name and email address are, to send the email from. It now uses the ones you configured in **Maintenance** ⇒ **Email Sending Configuration**, or if that has not been configured, it reads them from your default email program (such as Outlook, Outlook Express, or Mozilla Thunderbird).
- When sending emails to a Donor, by right-clicking on the Email Address field and picking **Send Email** from the popup menu, it now uses the [configuration](#) set up in **Maintenance** ⇒ **Email Sending Configuration**, and it uses a new window for entering the email details and sending them from within DONATION. (Previously, it used your default email program, such as Outlook, which might not have worked if you hadn't configured an email program on your computer because you only used web mail, such as hotmail or Gmail.)
- The date-selection windows for receipt [mailing labels](#) or [envelopes](#), created with **Reports** ⇒ **Receipt** ⇒ **Mailing Labels** or **Reports** ⇒ **Receipt** ⇒ **Envelopes**, now allow you to specify that you want to omit labels or envelopes for donors who have an email address. (If the receipts were sent by email, you don't also need to send them by mail.)
- When you start the program for the first time, it will try to detect what receipt style to use (for which country and language), based on your Windows Control Panel Regional and Language Settings, and let you know what it set that too. Unfortunately, if any existing users of the program in English Canada happen to have their Windows settings incorrectly set to "English (USA)", this new feature will set their receipt style to "U.S.A.", and they will have to fix it via the **Maintenance** ⇒ **Receipt Options** [menu option](#).
- Changed PDF files generated from the program (for example for receipts) to be non-modifiable, by encrypting them and setting a number of protection settings. This is required by the Canada Revenue Agency for emailed receipts in Canada. Please read the new help section on [Emailing Receipts](#) for further concerns about this, however.
- Added a warning in this Help file about using [bitmap signatures](#) on your receipts for Canadian users, based on CRA instructions which seem to technically forbid doing this in the way that DONATION does it.
- The Postal Code field is now automatically capitalized, so you don't have to enter it as capital letters in countries like Canada that use letters in their Postal Codes.
- Phone numbers entered as all digits with no separators are now automatically reformatted when a Donor record is Saved, so that 1234567 is changed to 123-4567, and 1234567890 is changed to (123) 456-7890.
- The validation of the Amount (or Total Amount) and Eligible Amount fields for the Donations on the main window is now mostly done when you **Save** the changes, not when you move out of those fields. This allows for a bit more flexibility in data entry, so for instance you don't get stuck on the Amount field if you want to go back and change the Date field, before entering the Amount.
- The Donor [Mailing Label](#) and [Envelope](#) reports now include a hidden field for total donations this year, so that you can [Filter](#) on it, for example to select only donors who haven't donated this year, or only donors who have donated certain amounts (for instance, over \$1,000).
- [Mail-merge letters](#) using the "Donor Information only" option now include a TotalAmount field that can be added to the letters, or [Filtered](#) on, showing the total amount this donor has donated this year (or 0, if they haven't donated anything). That allows you, among other things, to create "prospecting" letters to "donors" who have yet to donate.

- On the Reports and standard Receipt-viewing window, changed the "Page 1", "Prev Page", "Next Page" and "Last Page" buttons to VCR-style image buttons.
- Fixed a bug in the new category-selection drop-down control in the window for selecting a range of dates in **Reports ⇒ Donor ⇒ Donation Info ⇒ Sort by Name, Sort by Amount and Sort by Member/Envelope #**, and **Reports ⇒ Donation ⇒ All Donations ⇒ Sort by Name and Sort by Date**. That drop-down was missing a scrollbar, so you could only see the first 5 donation categories in it. (You could actually select any of the ones that were after the first 5, by using the down arrow key or PgDn, but that was not obvious!)
- Fixed a bug in the built-in receipts, if you had selected Quebec (French only) as the Receipt Style: your Organization Name 1 wouldn't appear on the receipts if Organization Name 2 wasn't also filled in, in **Maintenance ⇒ Organization Info**.
- Hopefully, fixed a problem where sometimes the novaPDF PDF printer doesn't get installed successfully and gives an error message.

#### **Fixes in Version 3.15c (June 18, 2009):**

- In **Reports ⇒ Donor ⇒ Donation Info ⇒ Sort by Name, Sort by Amount and Sort by Member/Envelope #**, and **Reports ⇒ Donation ⇒ All Donations ⇒ Sort by Name and Sort by Date**, you are now prompted for a category as well as a range of dates. You can select the default of "All", to include all categories, or select just one category. (To select two or more categories, but not all of them, select "All" then use a [Filter](#).)
- Changed all message boxes in the program (those small windows that come up with messages, and buttons such as OK, or Yes/No) to use a larger font, and sometimes to use boldface in order emphasize the important points.
- When you are filling in the Organization Info the first time you start the program, if your Organization Name includes the words "church" or "chapel", the program prompts you with an option to read the Help page for [Features for Churches](#).
- Added "PayPal" to the Cheque # / Paid By drop-down list for donations. (You can also enter it by typing just "Pay", and the rest will pop up.)
- Fixed a tiny bug in the feature that should restore the program's main window to the same size and position on your screen as where you last used it. In some cases, if the window wasn't maximized and you had it moved over to the right some, or down some, it might not be restored to that same position.

#### **Fixes in Version 3.15b (April 22, 2009):**

- Fixed a bug in **Reports ⇒ Donation ⇒ Summary by Category**: the final number at the bottom, "Total Distinct Donors across all Categories", was for the whole year, not the entered range of dates.

#### **Fixes in Version 3.15 (April 20, 2009):**

- There is a new initial [startup window](#) for the first time you start DONATION, which allows you to choose between the normal initialization steps for a new empty database and restoring a backup of the database, from a previous installation of DONATION on another computer, or the same computer.
- Added the **Reports ⇒ Report Browser** [menu option](#), which allows you to browse through all built-in reports in the program, and see detailed descriptions of them, to help you select which report you want to use. You can also still select all of the same reports via the **Report** menu's Donor, Donation, Receipt and Category sub-menus.

- When you are editing the donation date on the main window, you can now use the **+** and **-** keys, either on the top row of your keyboard or on the numeric keypad, to increase or decrease the date by one day. (This is similar to a feature in Quicken, QuickBooks and perhaps other accounting programs.)
- Added a menu option **Letters** ⇒ **Mail Merge Training Videos on the Web** which takes you to the web page which contains several videos for learning how to use the **Letters** menu options for mail merge letters and receipts.
- Added a new report: **Reports** ⇒ **Donation** ⇒ **Current Donor History**, which shows how much the current donor has given in each year that you have data for in the database.
- Re-ordered the options on the **Database menu**, to put the most important options (the ones for Backups) at the top. Also renamed **Import Data** to **Import All Data**.
- Added an option to include a return address section and a logo in the top-left corner of donor or receipt [envelopes](#).
- Added the **Use French Dates** checkbox in the **Maintenance** ⇒ **Receipt Options window**, to allows you to use French dates in the built-in receipts, and in all mail-merge letters and receipts.
- Added the special mail-merge [fields](#) «French» and «English», which when inserted into a mail merge template letter or receipt, overrides the **Use French Dates** setting.
- Added a right-click menu on the Donor List, with options **New Donor**, **Edit Donor**, **Delete Donor**, and **Find Donor**. These same functions can also be done with the **New** button in the Donor Details area, by clicking into any field in the Donor Details area, with the **Delete** button in the Donor Details area, and with **File** ⇒ **Find Donor** (or **Ctrl+F**) respectively.
- On the [reports](#) viewing window, disabled the **Page 1**, **Prev Page**, **Next Page** and **Last Page** buttons if there is only one page in the report.
- Added a few more helpful details to the Help page for [Filtering Reports](#).
- In **Maintenance** ⇒ **Change Password** ⇒ **Limited User Password**, the program now gives a message if you specify a [Limited User Password](#) when there is no Program Entry Password. This is because in that case, the program will not prompt for a password when it starts up.
- In the help page for [Saving Reports to Files](#), added a section about the very useful Save as type "HTML Table", which generates output that looks a lot more like the original report than other Save as types.
- Made some small changes to the [window](#) that comes up when you select **Letters** ⇒ **Mass Mailing**, so that it will fit if your screen dimensions are 800x600.
- Made some small changes to the main window, so that at screen dimensions of 800x600 the bottom part of the donations area (with the totals) isn't cut off.
- Fixed a tiny bug in **Letters** ⇒ **One Letter** and **Letters** ⇒ **Mass Mailing**, where if you pick the Current Donation information or Individual Donation information options from the first radio boxes, and include the «ReceiptNum» field in the letter (which is an unusual thing to do with that type of letter), the receipt number shows with only 4 digits, i.e. like 2009-0001, instead of the new 5-digit format introduced in version 3.14, 2009-00001.
- Fixed a tiny bug in **Reports** ⇒ **Receipt** ⇒ **All Receipts**, where part of the last digit of the Receipt # was cut off when you printed the report. (It looked fine on screen.)

#### Fixes in Version 3.14b (February 26, 2009):

- In all [mailing label](#) and [envelope](#) reports, added an email field that isn't printed, but can be filtered on. This allows you to use a filter to select only donors without email addresses.



- Fixed a bug introduced by version 3.13, where for Canadian users, receipts created before you installed version 3.13 could not be reprinted with **Receipt ⇒ Reprint Range**. (It would say there was no matching data for the report.)
- Fixed several related bugs introduced by version 3.13, where for Canadian users who selected the "Use separate receipts for Gifts in Kind" option, it wasn't correctly distinguishing between regular and gift in kind receipts when you used the **Letters** menu options, or if you had "Create receipts via mail merge instead of normal report method" selected and you used **Receipt ⇒ Reprint Range** or **Receipt ⇒ Gift in Kind Receipts ⇒ Reprint Range**. As a result, it might allow gift in kind mail-merge receipt formats to be generated for non-gift in kind donations, and non-gift in kind receipt formats to be generated for gift in kind donations.

#### **Fixes in Version 3.14 (February 25, 2009):**

- Added the **Database ⇒ Change Date of Donations** [menu option](#), which allows you to change all donations with one date to be on a different date. This would most often come up if you had used [One Date Donation Entry](#), and found that you entered a batch of donations for the wrong date.
- Changed receipt numbers to be 5 digits rather than four, so that for instance the first receipt number for 2009 would be 2009-00001. This allows for up to 99,999 receipts per year, rather than the previous maximum number of 9,999.
- Removed the Allow January option, because occasionally people were erroneously using it to enter donations in the next year, instead of using **Maintenance ⇒ Change Year ⇒ Next Year**. The Allow January option was only needed in the case of a postal strike around Christmas, if the government allowed charities to count donations received in January as being for the previous year. It will be restored to the program if that ever happens again.
- In **Help ⇒ Request or Install License Key**, it used to be that the "Request License Key for your Organization" button wasn't shown if the program couldn't see a reason for you to need a new key. (For instance, if your support and upgrades expiry date hadn't passed, and wasn't within the next two months, the button wasn't shown.) Now, it is always shown, to deal with some unusual circumstances when you may need to request an updated key even though you are not close to your expiry date. An example of that is if you have been granted an extra 3 months of support and upgrades due to a successful referral of another user, so you need an updated license key to inform the program of your new renewal date.
- Fixed a bug introduced by version 3.11: When starting a new year with **Maintenance ⇒ Change Year ⇒ Next Year** (or **Previous Year**), any email addresses that had been filled in were not copied over to the new year. To fix this for users who already opened the 2009 year and thus lost any email addresses entered in 2008, the new version of the program will prompt you when you first start it, to copy those email addresses forward from 2008 to 2009(if there are any to be copied).
- Fixed a bug where doing mail merge using a letter or receipt file that was saved to HTML by Microsoft Word, but not in the "Web Page, Filtered" format, could hang indefinitely. A helpful message will also come up when this is causing problems.

#### **Fixes in Version 3.13g (February 5, 2009):**

- Changed the installation program to prevent an extremely rare problem where it would get stuck on the License Agreement screen.

#### **Fixes in Version 3.13f (February 3, 2009):**



- Mail merge letters and receipts will not work if your Long Date Format, set in Control Panel, gives dates over 20 characters long. This normally only happens if your Long Date Format includes the name of the day (for example "Monday"), which probably is undesirable to appear in a date in a letter or receipt anyways. The program now tests for this problem when you do mail merges, and tells you how to fix it if you need to.

#### **Fixes in Version 3.13e (January 30, 2009):**

- Fixed a bug introduced by version 3.13d, where if you have selected "Create Receipts via mail merge rather than normal report method" in the **Maintenance** ⇒ **Receipt Options** [window](#), receipts for the USA gave an error message.

#### **Fixes in Version 3.13d (January 30, 2009):**

- Fixed a bug introduced by version 3.13, where if you have selected "Create Receipts via mail merge rather than normal report method" in the **Maintenance** ⇒ **Receipt Options** [window](#), any attempt to create receipts just gave the error message "Error retrieving receipt(s)".
- Added a prompt to optionally do a backup of your database before doing an update with the new **Help** ⇒ **Check for Updates** [menu option](#).

#### **Fixes in Version 3.13c (January 29, 2009):**

- Fixed a number of problems if you used Mozilla Firefox as your default web browser instead of the more common Internet Explorer. Basically, in that case none of the options in the program that take you to a web page (like **Help** ⇒ **Donation on the Web**) worked, and **Help** ⇒ **Check for Updates** didn't work either.
- Simplified the **Help** ⇒ **Check for Updates** [menu option](#) a bit, so that it now downloads the update file from the Software4Nonprofits.com web site directly, rather than doing it through your web browser (for instance Internet Explorer).

#### **Fixes in Version 3.13b (January 28, 2009):**

- Fixed a bug introduced by version 3.13 where in some unusual circumstances, you could not create new receipts with the **Receipt** menu options.
- Fixed a bug where after using most options in the **Receipt** menu, the **Database** ⇒ **Validate** menu option would always give an error.

#### **Fixes in Version 3.13 (January 26, 2009):**

- For Canadian users, there is now an option in the **Maintenance** ⇒ **Receipt Options** [window](#), for "Use different receipts for Gifts in Kind / Non-Cash Gifts", which defaults to being turned on (checked). When this is checked, a new **Receipt** ⇒ **Gift in Kind Receipts** sub-menu appears, with options for creating these different [Gift in Kind](#) receipts.
- When that option is selected, mail-merge letters created with the **Letters** menu options have a new option for "Gift in Kind Receipt information", with distinct receipt designs for this purpose provided in new sample letters.
- For Canadian users, there is now an option in the **Maintenance** ⇒ **Main Window Options** [window](#), to add a drop-down arrow to the Donation Description field. Clicking that arrow pops up a window for entering Appraiser information for Gifts in Kind, which may be required if the value of the Gift in Kind is significant.

- On the program's main window, changed the "Find String" prompt below the Donor List to read "Find Name / #", to make it clear that it also searches by member/envelope number. Put a border around the area to the right of that prompt, where what you are typing in to find appears. Changed both the prompt, and the bordered area, so that if you click in them, they bring up the [Finding a Donor](#) help page, to explain how they are used.
- In the **Reports** ⇒ **Custom Report** [menu option](#), don't display the Donor field "Member/Envelope #" if it's not displayed in the Donor Details area of the main widow (as set in **Maintenance** ⇒ **Main Window Options**), and name it either "Member #" or "Envelope #" depending on the related setting in **Maintenance** ⇒ **Receipt Options**.
- In **Reports** ⇒ **Custom Report**, other fields that are not displayed in the Donor Details area or Donation Details area (as set in **Maintenance** ⇒ **Main Window Options**) are also not shown in the lists of fields you can report on.
- Added the **Help** ⇒ **Check for Updates** [menu option](#), which brings up a window that allows you to check for updates to the program that are newer than your current version. It also allows you to specify whether or not the program should remind you to check for updates monthly. (By default, it does remind you.)
- All of the [mailing labels](#) reports now prompt you with an option to skip used labels on your first page of label paper, when you click **Print**. This allows you to use up partly used pages of label paper.
- The Donor [mailing labels](#) and [envelope](#) reports now prompt you for whether to do them for all donors, or only for donors with donations in a range of dates.
- There is a somewhat techie [new feature](#) available when editing template mail-merge letters and inserting fields into them, for optionally excluding pieces of those letters if the values in certain merge fields are empty.
- There is another somewhat techie [new feature](#) available when editing template mail-merge letters and inserting fields into them, for skipping the page break between letters, so that you can in effect create a report with mail merge, instead of letters or receipts. This could allow you to create certain types of reports that cannot be created with **Reports** ⇒ **Custom Report**.
- In the **Database** ⇒ **Switch Databases** [window](#), it now prevents you from entering a file extension of "METADATA", or file extensions containing periods. These restrictions prevent a couple of possible (though extremely rare) bugs.
- Fixed a bug in the **Receipt** ⇒ **Delete Range** [menu option](#), where if you tried to delete a range of over 500 receipts, you would get an inappropriate error message about not being able to reprint a range of over 500 receipts.
- When you run DONATION in Windows XP, it now checks for whether you are running with an administrative login, and advises you not to run it that way if you aren't. (With Windows Vista, you are already required to run it with administrative privileges.)
- Fixed a bug in the **Letters** ⇒ **Mass Mailing** [menu option](#) where very occasionally the page breaks between successive letters didn't work when you printed them or used Print Preview, and the top of the next letter would move up into the bottom of the previous one.
- Fixed a bug when generating mail-merge letters for users in Quebec who set their Regional and Language Options to French, where the letters would give an error message and fail if the name of the current month had an accent in it. At the same time, made the dates displayed in such mail-merge letters use the correct order of the elements, though they are still in English. (So, for instance, for French it would be "31 December 2009", whereas in English it is "December 31, 2009".)
- Fixed a bug where the **Save PDF** button on reports created with either **Reports** ⇒ **Custom Report** or **Database** ⇒ **SQL Select** didn't work - the "Printing PDF" progress window just stayed up forever (and had to be manually closed), and the PDF file was never created.

- Fixed a small bug where if you clicked **Save As** when you were viewing a report, then clicked the **Help** button on the window that came up, the Help for that window would not come up - it would say it could not find the DONATION.HLP help file.

#### **Fixes in Version 3.12b (November 11, 2008):**

- Fixed a bug in the [mail-merge receipts](#) for U.S. users, where if you included the Check # / Paid By field in the [DetailsTable](#) field, the heading of that column in the merged receipt used the Canadian spelling "Cheque" instead of the U.S. spelling "Check". (This also applies to mail-merge letters for the "Total Donations Information" option, which can also include the DetailsTable field.) **Note:** This bug was never present in the normal built-in receipts created with the **Receipt** menu options.
- When you create receipts and don't print them, then close the window displaying the receipts, there is a message box that comes up asking you whether to save the receipt information. (The included donation information has already been saved.) Clarified the question in that message box, and made the default answer for it be No, rather than Yes.
- When your support and upgrades eligibility has expired by at least one month, the program will start giving you messages informing you of that fact (though only once a month).
- Fixed a weakness in **Database ⇒ Backup, Database ⇒ Restore** and **Database ⇒ Restore Old Backup** where if the last backup directory used was the diskette drive (i.e. A:), and that drive is not currently available because there is no diskette in it, you would get error messages but not be able to pick a different drive for your backup or restore. Now it gives you an option to either make that drive available and try again (the only option previously), or instead switch to a standard backup directory on your local hard drive. (And having done that, you can then switch to any drive or directory in the Save Backup File As or Restore Backup File dialog box that comes up.)

#### **Fixes in Version 3.12 (September 30, 2008):**

- Added a way to mark a Donor as Non-Receiptable, so that no receipts will ever be generated for its donations. You do this by setting its Donor Category 1 or Category 2 value to "Non-Receiptable", which you can set up via the **Maintenance ⇒ Donor Category 1** or **Maintenance ⇒ Donor Category 2 options**. See [Handling Non-Receiptable Donors and Donations](#) for more information.
- Added **Reports ⇒ Donor ⇒ Envelope Box Labels**, which create labels containing just "Envelope # ..." and the donor's name, for all donors that have a Member/Envelope #. These labels could be put on the boxes in which you give the donors their envelopes for the year.
- Added a check, under Windows Vista or later versions of Windows, that the program is running as an Administrator. It will not run under those versions of Windows if it is not run as an Administrator, because various features will not work and unexpected problems can occur.
- When adding a [DetailsTable](#) to a mail-merge letter, you now have an option to specify that there should be two groups of columns on each row, in order to save space, as long as you are including at most three donation fields in the table.
- Fixed a bug where if you printed a report or a receipt to your printer, and then used the **Save PDF** button to "print" it to PDF, it would just print on the real printer again, and the "Printing PDF" window would stay up. (Unfortunately, this bug still exists in the mail-merge letters created with the **Letters** menu options.)

#### **Fixes in Version 3.11 (July 17, 2008):**

### New and Improved Features

- Added [Save to PDF](#) capabilities to the window for viewing and [printing reports](#) and standard receipts, and also to the [internal mail merge editor](#) for printing mail-merge letters.
- Added an Email Address field to the [Donor Details](#). If you use a standard email program like Outlook or Outlook Express, you can right-click on filled-in Email Address fields, and pick **Send Email** from a popup menu, to create an email addressed to this email address. (You can also use **File** ⇒ **Send Email** to do the same thing.) **Note:** Starting in version 3.20, the Send Email option no longer requires you to have an email program like Outlook configured, and does not use that email program.
- When converting to this version from prior versions, if one of your Other Info 1 through 3 fields had a label (as specified in **Maintenance** ⇒ **Main Window Options**) containing the word "Email" or "E-mail" (with any capitalization), the data in that field will be moved to the new Email Address field. The label for that Other Info field will also be changed back to "Other Info X".
- Made a number of [Donor Details](#) fields that not everyone uses optional. (Previously, only the Member/Envelope # field was optional.) You can select which fields you don't want to see via the **Maintenance** ⇒ **Main Window Options** [window](#).
- Made the **File** ⇒ **New Member/Env. #** and **File** ⇒ **Edit Comments** menu options work whether or not the cursor is currently in the relevant Donor Details field. (Previously, those menu options were only enabled when the cursor was in the relevant field.) Also, **File** ⇒ **Edit Comments** works even if you have made the Comments field invisible via the new options mentioned above.
- Added a drop-down arrow to the Member/Env. # field in the Donor Details area of the main window, which pops up a one-item menu for adding a new Member/Env. #. (This is the same behaviour as if you right-click in that field, and helps make this option more visible.)
- When [importing donations](#) via **Database** ⇒ **Import Donations**, it now allows the import if a donation being imported is for the same donor, and with the same date and amount, as an existing donation in the database, as long as it is for a different donation category. Previously it did not allow this.
- When saving a new or updated donor, a confirmation question has always come up if you either change the name of an existing donor that already has donations, or you enter a name that is the same name as another donor. Previously, if you answered "No" to those questions (to not make the change), it would cancel the insert or update entirely, losing your changes. Now, it just cancels the save, and lets you make your own changes if desired, then try Save again, or click Cancel if you prefer.
- When sending email to request a license key or evaluation extension, it now re-uses any previously used From Name and Email address in that email sending window. If the window hasn't been used before, it tries to determine them from an Outlook, Outlook Express or Thunderbird profile if you use one of those email programs.

### New and Fixed Reports

- Added two new reports: **Reports** ⇒ **Donor** ⇒ **Envelopes**, and **Reports** ⇒ **Receipt** ⇒ **Envelopes**. They print donors' names and addresses on standard #10 envelopes for all donors or all receipts with a specified receipt issued date, respectively.
- Added two new reports, **Reports** ⇒ **Donation** ⇒ **Receipted** and **Reports** ⇒ **Donation** ⇒ **Non-Receiptable / Pre-Receipted**. The former shows the details of all receipted donations. The latter shows the details of all donations that are not eligible to be included in a receipt, because they are for [Non-Receiptable Donors or Donations](#).

- Changed **Reports** ⇒ **Donation** ⇒ **Unreceipted Donations**, changing its name to just **Unreceipted**. Also, now it does not report on donors or donations that are Non-Receiptable, i.e. included in **Reports** ⇒ **Donation** ⇒ **Non-Receiptable / Pre-Receipted**. (Between this modified report and the two new reports in the previous bullet point, all donations are printed.)
- **Reports** ⇒ **Donation** ⇒ **All Donations** ⇒ **Sort by Name** and **Sort by Date** both now prompt for a range of dates to report on.
- Fixed a bug in **Reports** ⇒ **Donor** ⇒ **Donation Info** ⇒ **Last 4 Years** - it printed extra blank pages, and/or pages with just the year in a column.
- Fixed a bug in **Reports** ⇒ **Donation** ⇒ **Summary by Paid By** - it printed extra pages with just the Cheque # / Paid By value in a column.

#### Other Bug Fixes

- Previously, the installation of the Network Server version of DONATION would not work correctly if you had not already installed the normal Local Database version on the same computer. That is now fixed.
- Fixed the positioning of the right-click popup menus for the Member/Env. # and the Comments fields in the Donor Details area of the main window, which were not always correct if you changed the sizing of that window.
- Made some minor improvements to the main window's layout and behaviour when it is resized.

#### Fixes in Version 3.10c (April 30, 2008):

- Fixed a small bug introduced by version 3.10b into **Letters** ⇒ **Mass Mailing**, where the 2nd and subsequent pages of any mailing started a fraction of an inch lower down the page than the first page.
- In the new [internal mail merge editor](#), moved the **Edit** menu options **Insert Image**, **Insert Table** and **Insert Horizontal Line** to a new **Insert** menu, and added another option **Page Break** to that menu, to allow you to create multiple-page letters (for example for a receipt with a cover letter).
- Fixed a problem that could occur in the sample mail-merge receipt letters, where if you were using a signature bitmap the underline under it might not appear, or might appear incorrectly. However, unless you delete those files first before installing this version (or a later one) as an upgrade to version 3.10, they will not be replaced, because it might be replacing a version that you had edited!

#### Fixes in Version 3.10b (April 29, 2008):

- The [details and summary tables](#) that are available in the new mail-merged receipts (as well as mail merge Donation Totals information letters) will now have their header row repeated on subsequent pages, if the table starts on one page and continues on another.
- Added a menu and toolbar option for bringing up a Find dialog in the new [internal mail merge editor](#). Also, added some more details to the help for that editor.
- Fixed a bug that could cause page breaks between mail merge letters or receipts not to work properly (I think particularly if you had a very large logo in the letterhead area).
- A small error was fixed in the French and Bilingual mail-merge receipt samples. The 2nd row of dashes (separating the 2nd copy of the receipt from the part that the donor keeps) was too long, and went onto two lines when printed. However, unless you delete these files



first before installing this version (or a later one) as an upgrade to version 3.10, they will not be replaced, because it might be replacing a version that you had edited!

### **Fixes in Version 3.10 (April 25, 2008):**

- The [mail-merge](#) features on the **Letters** menu have been completely redesigned and greatly simplified. They now use an internal editor, rather than exiting you out to your word processing program to edit the letters and do the merges. They also now allow you to create almost perfect replicas of the built-in [receipts](#), but with whatever formatting or wording changes you want.
- New sample mail-merge letters and receipts are installed with the program, but any old mail-merge documents that you used with Microsoft Word can also optionally be converted to the new mail-merge letter format (which is HTML).
- When you generate receipts with the **Receipt** menu options, if you don't print those receipts, and exit the window displaying them, the program now gives you a choice as to whether or not to save the receipts back to the database. This lets you save them without printing them, so that you can later print them either with **Receipt** ⇒ **Reprint Range**, or with the **Letters** menu options. Or, you can choose the other option to have them not be saved, in the case where you just wanted to see what the receipts would look like (or didn't like something about what you saw), and don't want to keep the receipts in the database at this time.
- Renamed **Maintenance** ⇒ **Receipt and Letters Options** to **Receipt Options**, because the letters option (selecting a word processor) is no longer needed, with the new built-in editor for mail merge.
- In **Maintenance** ⇒ **Receipt Options**, there is now an option "Create Receipts using mail merge instead of normal report method". If you select this option, receipts created via the **Receipt** menu options are immediately displayed using the standard receipt mail-merge file, rather than as a report.
- Added menu options **Letters** ⇒ **Backup** and **Letters** ⇒ **Restore**, for [Backing up and Restoring Letters Files](#), which you can use for simple backups of your customized letter or receipt files, or for transferring them between two computers.
- In reports created with **Reports** ⇒ **Custom Report** or **Database** ⇒ **SQL Select**, it now displays an optional title, along with other standard report header fields, in the header of the report (as long as it is in the Normal format, not the Grid format). Also, columns containing dollar figures are now automatically totalled at the bottom of the report. The optional Report Title is specified in the SQL Select [window](#).
- Changed entry of donors so that if spaces were accidentally entered at the start or end of any of the name fields, they would automatically be removed. (Spaces would mess up the sort order in the Donor List.)
- For limited users, pressing Enter doesn't save a donation they are entering on the main window, as it normally does once you start entering a new donation. You have to click on Save or press F10 to save a donation you are entering. (You don't want limited users to accidentally save before they are finished entering a donation, because they aren't allowed to edit donations at all, even the ones they just edited.)
- Changed the **Database** ⇒ **Import Donors** [window](#) slightly. Now, when you Add fields from the Donor Fields list to the Fields to Import list, they are removed from the Donors Fields list to show that they are no longer available to be added.
- Fixed an obscure bug that only happened to one user, where trying to create a new donation would cause the program to give an error message about the function `gf_default_categorynum` and exit.



**Fixes in Version 3.05 (February 29, 2008):**

- Redesigned the [One Date Donation Entry](#) window, so that it optionally displays any existing donations for the specified date, as well as spaces to enter donations for all donors with no donations on that date. If you select that option, you can go in and out of that window multiple times for the same date (for example if you realize you need to add another donor), and still see the full totals at the end of your work.
- On the same window, on its settings window that comes up first, added options to show or not show the Cheque # / Paid By and Description fields for the donations.
- On the same window, change to highlight the Donor Name and Member/Envelope # fields on the selected row, to make it easier to see which row is selected.
- Changed the way the Cheque # / Paid By field for donations is edited, so that as you type, it shows you matches from the drop-down list. (This is similar to how some fields are entered in Quicken or QuickBooks, and is often called "autocomplete".)
- When you generate [Duplicate or Corrected Receipts](#) with the **Receipt ⇒ Current Donor Duplicate/Corrected** or **Duplicate/Corrected Receipt by Number** menu options, there are now two options: either include only the donations that were previously included in the receipt, or also include any new receiptable donations for the same donor.
- Added a new report, **Reports ⇒ Donation ⇒ Summary by Paid By**, which gives totals of all donations over a specified date range, broken down by the value in the Cheque # / Paid By field. (When cheque numbers entered into that field, it groups them all together under the Paid By value "Check" or "Cheque", depending on your location.) This report could be helpful for getting a summary of receiptable versus non-receiptable donations, among other uses.
- Added a new help page on [Features for Churches](#).
- Fixed a small display bug when you are editing a donor, and you resize the main window during the edit.
- In the 2nd part of **Reports ⇒ Donation ⇒ One Date Summary** (summary by Paid By), use the word "Check" for the summary of all donations with cheque numbers for U.S. users, instead of "Cheque". For Canadian users, "Cheque" is still used.
- Added a "Member / Envelope # Checksum" to the bottom of **Reports ⇒ Donation ⇒ One Date Details with Member/Envelope #**. This can be used as a double-check that you entered the donations for the correct donors when you use One Date Donation Entry, if you use envelope numbers and add those envelope numbers up with a calculator before doing your entries.

**Fixes in Version 3.04e (January 31, 2008):**

- Fixed a bug that only happened to users of the Network Version, and then only occasionally. When they created receipts that shouldn't be saved in the database (either because they were Sample receipts, or because they didn't Print them), they were sometimes saved in the database anyways.
- Fixed a couple of places in the program where message boxes (including the one confirming deleting a Donation) always used the date format MM/DD/YYYY, rather than the default format you had set on your computer. (That default date format was already used everywhere else in DONATION.)

**Fixes in Version 3.04d (January 25, 2008):**

- Fixed display bugs in the receipts, introduced in version 3.03. If you selected the [Receipt Style For](#) either Australian option, or "Other" (i.e. anything other than the more commonly-

used Canada, Quebec and U.S.A. options) in **Maintenance ⇒ Receipt and Letters Options**, the main amount printed over top of the heading for the amount.

- In **Reports ⇒ Donation ⇒ Details, One Page per Donor** and **Category Totals, One Page per Donor**, add in invisible fields category1 and category2 (for Donor Category 1 and Donor Category 2) so that you can [Filter](#) on them.

#### **Fixes in Version 3.04c (January 24, 2008):**

- Fixed a bug in the [Send Email](#) window (used to request [License Keys](#) or Evaluation Extensions), where if the character "#" appeared in your organization name or address, the email would not send properly. (There were smaller problems with "&" and "%" appearing your organization name or address, which were also fixed.)

#### **Fixes in Version 3.04b (January 21, 2008):**

- In the [Send Email](#) window (used to request [License Keys](#) or Evaluation Extensions), the default method of sending the email is now to send it invisibly via a web form on the Software4Nonprofits.com web site, which works for any user with an Internet connection. Also added a Help button to the Send Email window.
- Fixed a small problem introduced by a change in version 3.04, in Custom Reports and [SQL Select](#): It always displayed the report in Print Preview mode, like all regular reports. Unfortunately, this is not a good choice if you select the Grid display style, because that takes away the capability to resize or rearrange the columns, which is the big advantage of the Grid style. So, Grid reports do not start in Print Preview mode.

#### **Fixes in Version 3.04 (January 19, 2008):**

##### New Features

- Added the capability to use DONATION with the multi-user Firebird Server database software, instead of the single-user Embedded Firebird that it normally comes with. This can allow you to have [multiple users on a network](#) access the same database, either one at a time or simultaneously. Separate licensing (and payment) is needed to use DONATION with the Firebird Server, even for only one at a time usage, and additional payment is always required for simultaneous usage. Details are on the [PRICING](#) page on the web site.
- Added the **Database ⇒ Restore Old Database (DONATION3.DB)** menu option. It allows you to restore a database file from older versions of DONATION (version 2.70b or earlier), then have that file converted to the new database format.
- Added the **Database ⇒ Merge Duplicate Donors** menu [option](#).
- In the **Receipt ⇒ Filtered Donors** [menu option](#), added a Minimum Type drop-down, to control how the Minimum Amount criterion for donations is interpreted.
- Added the **Receipt ⇒ Delete Range** [menu option](#), for deleting a range of receipt numbers created in error, which have not yet been sent to the donors.
- Changed the **Maintenance ⇒ Receipt and Letters Options** [menu option](#), adding in a "Starting Receipt #" field, which can set your starting receipt number for each year to something other than 1. (Very few organizations will need to use this, or for that matter should use this!)
- Added the **Help ⇒ Quick Start** menu item, which takes you to the Startup Options page in the help.

- Added an option in **Database** ⇒ [SQL Select](#) (and thus in **Reports** ⇒ [Custom Reports](#), which uses SQL Select), to select either the Portrait or Landscape orientation for the generated report.
- Added a check for the program being started twice - the 2nd time, it just gives a message and exits.

#### Bug Fixes and Small Feature Fixes

- Fixed a bug where if the main window has been minimized when the program is closed (for example if you Shutdown or Restart your computer with DONATION minimized), it would start again minimized. As a result, users thought it hadn't started, tried to start it again, and got an error message about not being able to connect to the database. Now, if it was closed when it was minimized, it starts the next time at its original standard size and position.
- In **Database** ⇒ **Reassign Envelope Numbers**, if you chose to do it in alphabetical order, that order is now case-insensitive, like the Donor List. (I.e. if a last name starts with a small letter, it is sorted in with other last names that start with that same letter, capitalized.)
- Fixed **Reports** ⇒ **Donor** ⇒ **Potential Duplicates** so that donors are viewed as potential duplicates if either the business name, or the first and last names, are very similar (previously all 3 had to be very similar).
- Slightly re-wrote **Reports** ⇒ **Donor** ⇒ **Potential Duplicates**, so that it gives the same results as it used to, but will probably run more quickly. (However, it can still take a fair while if you have a very large number of donors.)
- Fixed a bug in **Reports** ⇒ **Custom Report**, where if you use the "Last, First" Donor column, and the "Sum(Total Amount)" or "Sum(Eligible Amount)" Donation columns, and a range of years, and Separate Totals, it gives an error when you run it from the SQL Select window.
- In the **Help** ⇒ **Request or Install License Key** [window](#), display the "Request License Key for your Organization" button if you are within two months of your annual renewal date, so that you can get an updated key if you have paid your annual renewal. Previously, this button was not visible on this window unless you either were not yet licensed, or your annual renewal date had passed.
- Fixed a minor bug in **Receipt** ⇒ **Filtered Donors**, where if you put in values of Other Info 1, Other Info 2 or Other Info 3 to filter on, they were case-sensitive. They are now case-insensitive, as they were in versions of donation prior to 3.00.
- Fixed a small bug with the backup reminders, where if you make a backup with the **Database** ⇒ **Backup** menu option, you might still get a backup reminder as you exit the program.
- Fixed a small bug in Custom Reports and SQL Select: The report was not displayed in Print Preview mode, which all regular reports are displayed in.
- Fixed a bug on the main window: On program startup, the focus wasn't always on the Donor List, so you couldn't immediately scroll with the arrow keys etc. or [find donors](#) by typing initial letters of their last name or envelope numbers.
- Included an extra DLL in the full installation programs (for example DONINST.EXE), which is required by systems that have certain Windows Accessibility features turned on, and which caused an error message ("PowerBuilder Accessibility Error ...") if it was absent. Note: Most users did not have those Windows features turned on, so they did not get the message or need the DLL.

#### Fixes in Version 3.03b (December 5, 2007):

- Fixed the fact that **Help** ⇒ **Revision History** took you to the Introduction page of the Help, rather than the correct page that shows the history of the changes to the program in successive versions.

### **Fixes in Version 3.03 (December 4, 2007):**

- Added a Business Name field to the Donor details. If there is a Business Name and also a Last Name and First Name, the business or organization is assumed to be the actual donor, and the individual's name is assumed to be a contact at that business.
- When this version starts up for the first time, any existing donors who have a Last Name filled in but no First Name are assumed to be businesses or organizations, and the contents of the Last Name field are moved to the Business Name.
- Made the importing and conversion routines, mail merge letters, and reports (including custom reports) work with the Business Name.
- The validation of required fields for the Donor is now done on Save, not as you edit the fields, so that you can enter the fields in any order without getting "stuck" in a required field. Required fields are either a Business Name or both a First Name and Last Name (or all three), plus Address Line 1.
- The program will now work with Large size Fonts (set in Control Panel's Display tool, Settings tab), as long as the screen resolution is at least 1024 x 768. It will also work with Normal Fonts with screen resolutions as small as 800 x 600. (Previously, problems occurred with Large size Fonts, most specifically that the printout of the receipts always looked bad.)
- The main window now adjusts its contents nicely when it is resized, and also, it remembers both its location and size between runs of the program.
- The One Date Donation Entry window also does that, and when it is displayed, the main window is hidden.
- The One Date Donation Entry [window](#) now has a Find Donor button, which you can use to find donors by Name or Member/Envelope # - the same as you get by using **File** ⇒ **Find Donor** on the main window. It can be accessed with either Alt+F or Ctrl+F.
- Tightened up the handling of support and updates eligibility, so that if your updates eligibility period (12 months from the date of your last Initial Purchase or Annual Renewal payment, or from being issued a free license) has expired, you cannot install an updated version of DONATION that was released after the expiry date. You also can't install a License Key that has already expired (i.e. that is more than 12 months old) unless you have previously installed a non-expired License Key on the same installation of DONATION.
- If you have exceeded the number of donors with donations that you are licensed for, and you bring up the [Evaluation and Licensing](#) window with **Help** ⇒ **Request or Install License Key**, it will show the button with which you request another license key (one that allows for your actual number of donors with donations).
- Added two new columns ("# Donations" and "# Donors") to **Reports** ⇒ **Donation** ⇒ **Category Totals**. There is also now an extra total at the bottom of this report, labelled "Total Distinct Donors across all Categories", that just gives the total number of donors with donations. This is the number of donors that is relevant for determining which level of payment is required for an Initial Purchase or Annual Renewal fee.
- Fixed a tiny bug in **Reports** ⇒ **Donor** ⇒ **Mailing Labels with Member/Envelope #** where if you used the Sort button to sort by the member/envelope #, the sort order was not quite correct.
- Fixed a couple of reports where the field for the donor name was too short, and names could be cut off at a shorter length than was necessary. (Many reports can still cut off the ends of very long names, because there is just not enough room on the page for the whole name.)

- Fixed a bug in **Reports ⇒ Donor ⇒ Potential Duplicates**, that caused it to print extra pages after the report.
- In **Reports ⇒ Donor ⇒ Mailing Labels**, added a non-displayed (i.e. invisible) member\_number field (the Member/Envelope #), so that you can [filter](#) or [sort](#) on it. For instance, you could create labels for only those donors who have a Member/Envelope # by using the filter "member\_number >= 0" (without the quotes).
- Fix a bug in the CSV files exported by **Letters ⇒ Mass Mailing**, that prevented them from being loaded into Excel properly, and could cause extra blank lines to appear in mail merge letters using the <<fulladdress>> field. Other than the blank lines, however, it already worked correctly if you were merging to Microsoft Word directly.
- Fixed a small bug in the sample mail merge letter receipts\_merge.doc, used in **Letters ⇒ Mass Mailing** when merging Receipt letters to Microsoft Word, where the <<ytdtotalamount>> field had a typo in it, causing errors to come up during the merge. (However, this file is never updated during an upgrade, so this will only help new users.)
- Improved the error message if there is a conversion error when converting the database from version 2.70 or earlier to the current version. If the problem is in converting the DONOR table, the message points to a helpful Support Forum posting about the problem.
- Made the **Maintenance ⇒ Organization Info** window wider, so it would be clearer that you can enter up to 70 characters for the Organization Name fields. (You always could do that, and the field would scroll right if necessary as you typed, but this makes it easier to see all of a long organization name.)
- Very minor (unusually unnoticeable) change to the formatting of the receipt, to make printing to PDF with some PDF printer software work better.
- Added a section on exporting reports to PDF to the help page [Exporting Data from the Program](#), and added PDF to the help's index.
- Fixed a weakness of the **Database ⇒ Import Donors** [option](#), where it would allow you to import invalid or duplicate member/envelope numbers.

### Fixes in Version 3.02 (November 5, 2007):

- Fixed a bug in the receipts, where if a donor had a member/envelope #, that number was not being printed on the receipts. (It was printed there until version 3.00.)
- Added a control in the **Maintenance ⇒ Receipt and Letters Options** [window](#), that allows you to specify the label for the member/envelope # field on the receipts, if you use such numbers for your donors. It can be "Envelope #" (the default), or "Member #", or you can choose to never have the member/envelope numbers displayed on receipts at all.
- On **Reports ⇒ Donation ⇒ Details, One Page per Donor** and **Category Totals, One Page per Donor**, if you use the Sort or Filter buttons, it no longer displays the sort or filter criteria on each page of the report. (Most reports do display them, but because these reports may be sent to donors, it is less appropriate to display the sort or filter criteria on them.)
- Warn licensed users if they have more donors with donations than they are licensed for, and give an option in that case to go to the PRICING page on the web site to pay for the difference.
- In the version of the Evaluation and Licensing [window](#) reached via **Help ⇒ Request or Install License Key**, the **Request License Key** button is now visible if either your support and upgrades period has expired, or you have exceeded the number of donors with donations that you are licensed for.
- Fixed a small bug where after re-opening a new database or new year (for example with **Maintenance ⇒ Change Year, Database ⇒ Restore**, or **Database ⇒ Switch Databases**), the drop-down list of Donor Category 1 and Donor Category 2 values was not



re-loaded from the database (or year) that was just switched to, and thus an incorrect list could be displayed.

- Improved the wording of the error messages given if an invalid donation date is entered, either on the main window or on the One Date Donation Entry Options window.
- Fixed a weakness in **Database ⇒ Backup** and **Database ⇒ Restore**, where if the last backup directory used was a drive that is not always available (for example a CD drive or a drive for a USB memory key), and it is not currently available, you would get error messages but not be able to pick a different drive for your backup or restore. Now it gives you an option to either make that drive available and try again (the only option previously), or instead switch to a standard backup directory on your local hard drive.
- Changed a couple of reports (**Reports ⇒ Donation ⇒ One Date Summary** and **Summary by Category**) to have at least 1/2" left margins, so that they can be 3-hole punched without cutting out any of the text on the left.
- Added a note to the [Restoring Backups](#) help page about how to restore backups from version 2.70 or earlier (DONATION3.DB files).

#### **Fixes in Version 3.01 (November 1, 2007):**

- Added an option to the **Maintenance ⇒ Main Window Options** [window](#) to set the default donation category.
- Added an option to the **One Date Donation Entry Options** [window](#) to override that default donation category, for that use of the **One Date Donation Entry** window.
- Include "Gift in Kind" on the Cheque # / Paid By drop-down for donations, for all users. (Previously it was only shown for U.S. users.)
- Added the menu option **Database ⇒ Reassign Envelope Numbers**, to reassign the envelope numbers to all or some donors.
- Fixed a bug introduced in version 3.00, where **Database ⇒ Restore** could sometimes fail with the message "Can't rename database file ... prior to doing the restore."
- Fixed a bug in **Letters ⇒ One Letter** and **Letters ⇒ Mass Mailing** where the Browse button used to select a word processor document file with your merge codes in it would not work properly, and you had to instead type in the full pathname for that file.

#### **Fixes in Version 3.00e (October 27, 2007):**

- Fixed a minor bug in **Maintenance ⇒ Donation Categories**, **Maintenance ⇒ Donor Category 1** and **Maintenance ⇒ Donor Category 2** - none of them showed their lists of categories in alphabetical order. However, the lists were already in the right order in the drop-down fields used for data entry.

#### **Fixes in Version 3.00d (October 24, 2007):**

- Improved the installation program to resolve a problem for users with Windows Vista, when they are upgrading from version 2.70 or lower, where the newest version of their previous database file would not be converted to the new format.

#### **Fixes in Version 3.00c (October 22, 2007):**

- Added a new menu [option](#), **Database ⇒ Delete All Data**, which does that - delete all data in your database. This would rarely be used, but can be used to help with restoring backups from version 2.70 or earlier.



**Fixes in Version 3.00b (October 22, 2007):**

- Fixed a bug where when you are logged in as a limited user, running **Reports** ⇒ **Donation** ⇒ **One Date Details with Member/Envelope #** gives an error message and crashes the program.
- Improved validation of values entered for the Member/Env. # Donor field, restrict the values to be between 0 and 999999999.

**Fixes in Version 3.00 (October 19, 2007):**

- Changed to using the embedded version of the Firebird Database, instead of the previous Sybase Adaptive Server Anywhere (ASA) database. If you have a previous version of DONATION, the first time you start this new version, you will be prompted to let it automatically convert all of your data from the old database to the new database. (The new Firebird database file is named DONATION4.DB, whereas the old Sybase ASA one was named DONATION3.DB.)
- Unlike with the old Sybase ASA database, it is not currently possible with the new Firebird database to move your database to a different computer on a local area network and use it remotely on that computer. This will be possible in a future release, using the full multi-user version of Firebird.

As part of the change to Firebird, several changes to database fields were made, and several other related changes were made, as follows:

- Expanded the First Name field for the Donor from 20 characters to 30 characters.
- Changed many reports that used to have separate columns for the First name and the Last Name to instead just have a Name field, which displays the name in the format "Last, First".
- Added a 2nd Organization Name field in the **Maintenance** ⇒ **Organization Info** [window](#), which is intended for use by Quebec organizations that have both an English and a French name. Receipts for users in Quebec (identified by picking one of two relevant options in the **Maintenance** ⇒ **Receipt and Letters Options** [window](#)), will have both names printed on their receipts, if they have both been filled in.
- Changed the lookup of Donors in the Donor List which is done by typing in a Member/Envelope #, so that it waits until you have typed in the entire number before it goes to the donor with that number. Previously, if you typed in "1", for instance, it would go to the first donor whose Member/Envelope # *started with* "1", which was not very helpful. Now at that point it will only go to the donor whose Member/Envelope # is exactly "1".
- Replaced the optional donation field called "Fair Market Value", which corresponded to the total amount of a donation when the donor received something in return for it (for example at a fundraising dinner, where they receive the dinner). Previously the "Amount" field was meant to be the amount that the donor could claim on their taxes (excluding the value of the thing they received, which the Canada Revenue Agency calls the "advantage"), and the "Fair Market Value" field was the total amount they actually gave. Now, instead of "Fair Market Value" there is an optional "Eligible Amount" field. When this is displayed, the main "Amount Field" is now called "Total Amount", which should be clearer. To put this another way, the "Amount" or "Total Amount" is really the same as the old "Fair Market Value", and the "Eligible Amount" is really the same as the old "Amount". You do not have to enter an Eligible Amount unless it is less than the Total Amount.
- Canadian [receipts](#) now comply with the Canada Revenue Agency's guidelines for what it calls "split receipting". New wording was added to the receipts when the donor has received an "advantage" (something in return) for their donation, which is indicated by entering an

Eligible Amount which is less than the Total Amount. There is an option in the **Maintenance ⇒ Receipt and Letters Options** [window](#) that enables entering the Eligible Amount.

- Made some changes and additions to the merge field names for **Letters ⇒ Mass Mailing**. In particular, the field "year" is now named "year\_number" in all letters; in the Receipt letters the field "ytdtotal" is now named "ytdtotalamount"; and some fields for eligible amounts have been added. This may require some adjustments to any mail-merge letters you have been using, though only if they included those fields.
- In the **Database ⇒ Import Data** [option](#), added the ability to import the Eligible Amount into both the Donation and the Receipt tables.
- The **Database ⇒ Backup** [option](#) and the **Database ⇒ Validate** [option](#) now no longer require a separate "Check Backup" or "Check Validate" step.
- Backup files now have an extra file extension added to them, for example DONATION4.DB is normally backed up to DONATION4.DB.GBK, and they are not exact copies of the database file they backed up. (In fact, they are smaller, but they do contain all of the same information.) They cannot be just copied back in order to do a restore - you must use the **Database ⇒ Restore** [option](#).
- Backups made with earlier versions of DONATION can no longer be used with this version.

Other improvements unrelated to the change to the Firebird database include:

- Added a [popup calendar](#) to the Donation Date field, which can be used either for entry, or for checking if you are not sure of the current date format. You can also still just type in the date.
- The date for [One Date Donation Entry](#) is now entered on the One Date Donation Entry Options window, rather than the One Date Donation Entry window itself.
- Changed **Reports ⇒ Donor ⇒ Donation Info ⇒ Totals and Pledges by Name** so that it only shows donors who have either a pledge or donations this year.
- Removed the **Database ⇒ Import ChurchMouse Donors** option, because nobody was using it anymore.
- The program now prompts you weekly (or at another desired frequency) to backup your database. You can set the desired frequency of reminders to Never, Daily, Weekly or Monthly, by using **Database ⇒ Backup Reminder Frequency**.
- Fixed a bug in both **Letters ⇒ One Letter** and **Letters ⇒ Mass Mailing**, where if you clicked the Browse button to select a different input word processor file, the File Open dialog box that came up did not take you to the Letters directory under your installation directory.
- Fixed a minor bug, where after deleting either a donor or a donation the focus did not go back to the Donor List, so you couldn't immediately use the cursor movement keys to move to another donor, or do a find by typing the first letters of a last name or a member/envelope number.
- In the Evaluation and Licensing window, changed the wording of the button "Request Paid or Free License for your Organization" to "Request License Key for your Organization", for clarity.
- Adjusted the font used in the reports displayed by **Reports ⇒ Custom Report or Database ⇒ SQL Select**, to be Arial 10pt. Previously it was a smaller font.
- Fixed a very minor issue in the window used to preview donors or donations to be imported with **Database ⇒ Import Donors** or **Database ⇒ Import Donations**, or data to be merged with **Letters ⇒ Mass Mailing**, where pressing ESC when viewing that window would do the import or the merge, rather than cancelling it as ESC should do.

- For Windows Vista users, the program must now be run by a user that has Administrative privileges. This prevents problems with some features not working properly, for instance **Database** ⇒ **Switch Databases**.

See Also: [Revision History - Latest Version](#), [Revision History 2011 to 2014](#), [Revision History - Earlier Versions](#)

## 26.5 Revision History - Earlier Versions

See Also: [Revision History - Latest Version](#), [Revision History 2015 to 2018](#), [Revision History 2011 to 2014](#), [Revision History 2007 to 2010](#)

Fixes in Version 2.70b (July 25, 2007):

- Made several small improvements to the [software licensing](#), including fixing a bug that prevented it from working properly on computers running Windows 2000

Fixes in Version 2.70 (July 18, 2007):

- DONATION now has [software licensing](#), which means that when it is first installed, it is a 60-day evaluation version with slightly limited features, and you need to receive a license key from Software4Nonprofits.com in order to use all features
- U.S. users now have the option of entering the Tax ID / EIN in the **Maintenance** ⇒ **Organization Info** window, in which case it will be displayed on receipts.
- Added a "Non-Receiptable" option to the Cheque # / Paid By drop-down list. This has the same effect as the existing "Pre-Receipted" option, which is that donations with this selection will never appear on an official receipt generated by the program.
- Added a "PAR" option to the Cheque # / Paid by drop-down list. (This is the name of the United Church of Canada's Pre-Authorized Remittance plan.)
- Added a scrollbar to the Cheque # / Paid By drop-down in the One Date Donation Entry window, which did not have one before.
- Changed **Reports** ⇒ **Donor** ⇒ **Donation Info** ⇒ **Sort by Name**, **Sort by Amount**, and **Sort by Member/Envelope #**, so that they prompt for a range of dates, and only show the total donations between those dates for the current year, and between the corresponding dates for the prior year.
- Changed several commonly-used reports that had only 1/4" left margins to have 1/2" left margins, so that if you wish to 3-hole punch them and file them in a binder, the punches do not sometimes cut out some of the first field's text.
- Fixed a bug in **Help** ⇒ **View License Agreement**, where it would not work properly if your default web browser was Firefox rather than Internet Explorer.
- Added a new help and manual page on [Keyboard Shortcuts](#) in the program.
- Added a new help and manual page on [Statements and Receipts](#) which explains some options for using reports in conjunction with receipts to inform your donors of their donations regularly through the year, and also summarizing all of them at year end.

Fixes in Version 2.60 (May 1, 2007):

- DONATION is now shareware (free to download and evaluate, pay if you are actually using it) rather than always free as it was before.
- There is a new license agreement for DONATION reflecting this fact. It is installed with the program, in the file LICENSE.htm, and can be displayed with **Help** ⇒ **View License Agreement**. You are also required to agree to the terms of this license agreement when you run the installation program.
- This isn't exactly a change to the program, but you can now find the program's web site at <https://www.Software4Nonprofits.com>. The old address of

www.FreeDonationSoftware.org still works (and in fact entering it in your browser takes you to www.Software4Nonprofits.com) but the new domain name is more appropriate for the fact that DONATION is now shareware rather than always free.

- When you [print reports](#), a Print dialog box is now displayed, to allow you to select a printer, or a range of pages or number of copies to print. The only exception to this is when you are printing real (not sample) receipts, in which case it is important to print all of them, so the Print dialog box is not shown.
- For some reason the **Help ⇒ Email Dan Cooperstock** option was at least sometimes bringing up a web browser window before bringing up the email to send. That has been fixed, and in addition this option has been renamed to **Help ⇒ Email Software4Nonprofits.com**.

Fixes in Version 2.52 (February 8, 2007):

- Changed DONATION's main help file to be an HTML Help file rather than the old-style Windows Help file. This is necessary because Windows Vista does not come with a viewer for Windows Help files. Unfortunately, there are a few places in the program that still need to use Windows Help, so their help will not work under Windows Vista.

Fixes in Version 2.51 (October 29, 2006):

- Updated the Canadian (including Quebec) receipts to use the most current expected wording from the Canada Revenue Agency. However this still only handles what they call "cash gifts with no advantage".
- **Maintenance ⇒ Receipt and Letters Options** now allows you to enter the location at which the receipts are issued. This is required for Canadian receipts, and printed on the receipt. For all other countries, this may be entered, but it is not printed on the receipt.
- Added an option in **Maintenance ⇒ Receipt and Letters Options** to create French-only receipts for Quebec. (Previously receipts for Quebec were always bilingual - English and French.)
- Added a help page about [Exporting Data from the Program](#).

Fixes in Version 2.50 (April 15, 2006):

- It turned out that version 2.41 has two problems: First, it only worked on Windows 2000, XP, and 2003. Second, it was missing some files that would be required on some (but not all) users' machines. This version still only works on those newer versions of Windows, but it has had the missing installation files added in.
- Otherwise, it is the same as version 2.41.

Fixes in Version 2.41 (March 2, 2006):

- Added three new options to the Cheque # / Paid By drop-down list for donations: Debit Card, Direct Debit, and PAC (Pre-Authorized Chequing). You can still also just type in a cheque number, or any other values that aren't on the drop-down list.
- Fixed an occasional bug in Canadian receipts, where if the listed donation details went onto a 2nd (or further) page, they could overlap with the category totals.
- The program is now being created with PowerBuilder version 10, which was required to fix the previously mentioned bug.
- Added a help and manual page on Modifying Reports Using SQL, which is not a new feature, but was not previously documented properly. (Note: The feature was removed in version 3.38, and replaced by the ability to [Memorize Reports](#).)
- **Note:** This version had some problems (see above under version 2.50) and was quickly withdrawn, so only a few users have it.

Fixes in Version 2.40f (October 16, 2005):

- Added the ability to select which donors you want to see in the One Date Donation Entry [window](#), based on donor categories or whether the donors have already donated in the current year.
- In the One Date Donation Entry window, after selecting which donors you want to see, the Donation Date field is highlighted, to remind you to set it to the appropriate value.

#### Fixes in Version 2.40e (March 6, 2005):

- Added a pointing hand icon to highlight the current row of the One Date Donation Entry [window](#). This is just like the one in the Donations area of the main window.
- In the installation program, made sure that the ODBC datasources created for accessing the program's database cause Sybase Adaptive Server Anywhere (the database software) to not use TCP/IP for communications. This prevents a problem that some users were having where Microsoft Windows Firewall was preventing access to the program.

#### Fixes in Version 2.40d (February 5, 2005):

- Fixed a bug introduced in version 2.40, where the **Database ⇒ Import Donors** menu option gave several error messages and didn't work

#### Fixes in Version 2.40c (February 2, 2005):

- For users in the U.S.A., changed the wording from "Cheque #" to "Check #" in all remaining places in the program where it had not yet been changed.
- For users in Australia, finalized the wordings on the Receipt for both organizations with DGR (Deductible Gift Recipient) status and those without that status. For details, see the help page about the [window Maintenance ⇒ Receipt and Letters Options](#).
- Fixed a weakness in the installation program that allowed you to install version 2.40 into a different directory on your PC from the directory in which you installed your earlier version. (There is never a good reason to want to do that, because it will never overwrite your existing database during an install.)

#### Fixes in Version 2.40b (January 30, 2005):

- For users in the U.S.A., changed the wording from "Cheque # / Paid By" to "Check # / Paid By" on the Donations area of the main window, and on the One Date Donation Entry window. This change had already been done on the Receipts, and a few reports. Some other reports still say "Cheque No".

#### Fixes in Version 2.40 (January 30, 2005):

- For Canadian users, added the name and the web address of the Canada Revenue Agency to the bottom of the receipts, as required by a new regulation they have made.
- added a new optional field to the Donation details area on the main screen, Fair Market Value. It only appears if you select it on the **Maintenance ⇒ Main Window Options** [window](#). For now, it is not used in the receipts or anywhere else in the program (see the section on [Fair Market Value](#) in the page on Entering New Donations for more details.)
- Added a new [utility Database ⇒ Restore](#) which you can use to restore backups that you made with **Database ⇒ Backup**, or if you are [transferring](#) your data between two computers.
- On the [window Maintenance ⇒ Receipt and Letters Options](#), added options for versions of the receipt for Australian Deductible Gift Recipients, other Australian organizations, and Other countries (not the U.S.A., Canada or Australia). **Note:** All users other than organizations in Canada or the U.S.A. should be sure to go to this window and select one of these new options!
- The program is now being created with PowerBuilder version 9 and the database software is now Sybase Adaptive Server Anywhere version 8. I had been using the same



old versions since 1999 - PowerBuilder 6.5, and Sybase SQL Anywhere 5.5. (Adaptive Server Anywhere is a new name for SQL Anywhere.) Unfortunately, this change has increased the size of the main installation file that you have to download to about 8MB from its previous size of 5MB.

- There is a brand new installation program for DONATION, created with a newer version of the software I use to create the installation program, which is called SetupFactory.
- changed **Help** ⇒ **Read Manual**, which previously let you read a local HTML version of the manual, to instead go to the program's web site, from where you can read a PDF version of the manual. This saves some space in the downloaded installation file. In addition, the PDF version is much more nicely formatted.
- fixed a minor bug in **Database** ⇒ **Import Donors** where an error message that doesn't come up at all often, about being unable to open a file to hold conversion problem messages, gave the wrong filename
- fixed a bug in **Database** ⇒ **Backup** where it would not store the backup to the root directory of any drive other than the diskette drive, A: (for example C:\), and did not give an error message. (The error did show up if you did **Database** ⇒ **Check Backup**.)
- fixed a "security" bug where [Limited Users](#) were allowed to create [Custom Reports](#), which let them see data they should not have been able to see

#### Fixes in Version 2.37 (December 28, 2002):

- added the [options](#) **Database** ⇒ **Copy Missing Donors** ⇒ **From current year to previous year** and **From previous year to current year**, which allow you to copy missing donors and categories from one year to another
- fixed a nasty bug in printing receipts with many donations on the receipt, when they were created as a group, and the details lines were 2 across. In the bug, some of the details could be omitted. I informed users about this bug about a year ago, along with some work-around solutions.
- as part of fixing that bug, when the details lines of receipts are 2 across, they now go across then down, rather than down one column then down the next column, and they sometimes take less room on the page
- added an [option](#) in **Maintenance** ⇒ **Receipt and Letters Options** to omit the Summary by Category section from the receipts
- redesigned the **Maintenance** ⇒ **Receipt and Letters Options** window to be easier to use and understand
- improved the use of French on the bilingual (French and English) receipts for Quebec
- fixed an obscure bug in **Maintenance** ⇒ **Main Window Options**. If you included quotation marks in the Other Label fields, the program would crash, and then refuse to re-start. Now, you can't save changes on that window if you have included quotation marks in any of those fields.

#### Fixes in Version 2.36 (September 29, 2002):

- added the [option](#) **Reports** ⇒ **Custom Report**, which allows you to specify a simple custom report by selecting columns from lists etc. This option creates the SQL for the report, then displays it in the **Database** ⇒ **SQL Select** window, from where you can create the report.
- added an [option](#) to **Database** ⇒ **SQL Select** that allows you to view the report in the standard format, or in a grid (which allows you to change column orders and column widths)
- changed the results of **Database** ⇒ **SQL Select** so that columns holding donation or receipt amounts are nicely formatted as currency



- improved the report, **Reports** ⇒ **Donation** ⇒ **One Date Summary**, so that it gives totals by Paid By as well as totals by Category.
- added "Cheque" to the options on the drop-down in the Donations area of the main window for "Cheque # / Paid By", for those users who don't chose to record individual cheque numbers in this field, but still want to record that it was a cheque.
- fixed a couple of obscure bugs in **Maintenance** ⇒ **Change Year** ⇒ **Next Year** and **Previous Year**, which could cause a very few users to get an error message when they try to use them for the first time on a new year
- fixed a bug in **Reports** ⇒ **Receipt** ⇒ **Mailing Labels**, if you select the 2.625" x 1" size, and a donor has no Firstname (for example a company name entered only in the Lastname field), the name would be omitted from the label

#### Fixes in Version 2.35c (March 31, 2002):

- added a new report, **Reports** ⇒ **Donor** ⇒ **Donation Info** ⇒ **Last 4 Years**, that gives totals for each donor for each of the last four years, plus a grand total.
- added an option on the [Help menu](#), Support Forums on the Web, that goes straight to the web-based Support Forums for DONATION. Updated the documentation on [Technical Support](#) options.

#### Fixes in Version 2.35b (January 2, 2002):

- fixed an unusual bug in **Maintenance** ⇒ **Backup**. The bug occurred if you chose not to backup to a diskette in the A: drive, i.e. you were backing up to your hard disk. If you had significantly over 2GB of free space on the hard disk, it would say that you did not have enough disk space to do the backup!

#### Fixes in Version 2.35b (January 2, 2002):

- fixed a bug in version 2.35. The bug occurred when you started a newly installed program for the first time (as opposed to an update to an existing program), or when you used **Database** ⇒ **Switch Databases** to create a new empty database. The first time you started the program, after you provided the Organization Info and clicked OK, the program crashed. Then, after restarting the program, unless you went into **Maintenance** ⇒ **Donation Categories** and clicked OK, creating new donations would also crash the program.

#### Fixes in Version 2.35 (January 1, 2002):

- added a new [import](#) routine **Database** ⇒ **Import Donations** that can be used to import regular (for example monthly) donations from a text file, or to import donations from a previous source when you first start to use the program
- improved the messages given by the program during importing of data, if there is data that cannot be imported successfully
- added a new field that you can [enter](#) for each donation: Description. To make room for it, moved the buttons on the main window.
- added an option in **Maintenance** ⇒ **Main Window Options** that determines whether the new Description field is visible. If it is not selected, the buttons on the main window go back to their old positions (which I believe look better).
- added an option in **Maintenance** ⇒ **Receipt and Letters Options** to see the Description in the details area of the receipts. Only one of this option and the option to print the "Cheque # / Paid By" on the receipt can be selected, because there really isn't room for both.
- added the new Description field to **Reports** ⇒ **Donation** ⇒ **Current Donor**, and **Reports** ⇒ **Donation** ⇒ **Details, One Page Per Donor**

- both **Letters** ⇒ **One Letter** for the Current Donation information, and **Letters** ⇒ **Mass Mailing** for the Latest Donation information allow you to export the new Description field to mail-merge letters. Several Receipt fields were also added to these options, in case you prefer to use them to [generate receipts with mail-merge letters](#).
- for U.S. users, there is now an additional option on the drop-down list for the donation "Cheque # / Paid By" field: "Gift In Kind". There is no special processing for [Gifts In Kind](#), however, at this point.
- added an option in **Maintenance** ⇒ **Main Window Options** to allow entry of donations for \$0.00. This might be used with Gifts In Kind, or to keep a record of NSF cheques in the database. When you enter such a donation, you must also enter a Description for it.
- changed **Database** ⇒ **Backup** slightly so that you can re-use old diskettes with backups on them without cleaning them off first. (It prompts you to confirm it is OK to replace the old backup.)
- when viewing reports, the dialogs that come up for Sort, Filter, and Save As now have help buttons which take you to help pages on those topics
- improved the documentation on [Year End Procedures](#)
- added a new menu option, **Help** ⇒ **Revision History**, that allows you to go straight to viewing the revision history page in the help file

#### Fixes in Version 2.34 (May 9, 2001):

- changed the program to always display currency figures in regional formats, according to the settings you make in Windows Control Panel's Regional settings. This applies to on-screen amounts, as well as reports, receipts, and mail-merged Letters. This is useful for international users (i.e. other than in Canada and the U.S.A.).
- changed the **Maintenance** ⇒ **Change Year** ⇒ **Previous Year** routine to give you an option to copy the current year's donors and categories to a previous year for which there is no existing data. Previously, you could not go back to work on years before the first year for which you had entered data when you first started the program.

#### Fixes in Version 2.33 (April 26, 2001):

- fixed a bad bug in the password routines, that would make some passwords assigned by **Maintenance** ⇒ **Change Password** ⇒ **Program Entry Password** fail to work on re-entry to the program. (The same problem applied to the other two types of password as well.)
- added three [new reports](#), to list the various types of categories which are set up with the options of the **Maintenance** menu. They are in the new **Reports** ⇒ **Category** menu, with the names **Donation**, **Donor Category 1**, and **Donor Category 2**.
- added a grand total by donor to the bottom of each page of **Reports** ⇒ **Donation** ⇒ **Category Totals, One Page per Donor**. Previously it only listed the total for each category.

#### Fixes in Version 2.32 (March 25, 2001):

- Split out some of the options from the **Maintenance** ⇒ **Organization Info** window into a [new window](#), **Maintenance** ⇒ **Main Window Options**.
- Added an optional [Limited User Password](#), which can be used for Tellers or Counters in churches with envelopes, who are permitted to do data entry in DONATION, but with severe limits on what data they can enter and view.
- Added several options in the new **Maintenance** ⇒ **Main Window Options** window, which control exactly how much the Limited Users can do.

- Added another option in the new **Maintenance** ⇒ **Main Window Options** window, which allows the Member/Envelope # field to be removed from the main Donor Details area, for those who don't use it.
- Added an option **Receipt** ⇒ **Reprint Range**, which allows you to reprint a group of receipts for the current year, specified by a range of receipt numbers (for example numbers 50 to 100), without marking them as Duplicate receipts.
- Changed the options for changing passwords on the **Maintenance** menu. There is now a **Maintenance** ⇒ **Change Password** sub-menu, with three options: **Program Entry Password**, **Limited User Password**, and **Receipt Password**.
- For **Letters** ⇒ **One Letter** and **Letters** ⇒ **Mass Mailing**, when using it to [generate receipts](#), you can now include a new field – YTDTOTAL. This is the total dollar amount of receipted donations for the current donor in the current year.
- Improved the **Database** ⇒ **Delete Old Data** option. Previously, whatever year you were currently working on (which might not be the latest year for which you had data in the database), it deleted data 2 years older than that, or older. Now, it deletes data two or more years older than the latest year you have data for in the database.
- Added a check on program startup that you have selected Small Fonts in the Windows Control Panel's Display tool. The program unfortunately just does not look right with Large Fonts, and in particular the built-in receipts look all wrong both on the screen and when printed if you use Large Fonts.
- Cleaned up the colours on all of the windows to make them consistent. Previously everything looked OK if you used Windows Standard colours, but not if you used some of the alternate colour schemes that Windows allows you to use. Now all windows in DONATION are the colour that Windows calls "ButtonFace". (Previously some of them were a grey/silver colour, and some were ButtonFace, which was not obvious to us or to most users, because in the Windows Standard colours, ButtonFace is grey/silver.)

#### Fixes in Version 2.31 (February 19, 2001):

- Added a **Split Donor** button on the [One Date Donation Entry](#) window, which allows you to enter two or more lines (in different categories) for the same donor.
- Added a **Totals by Category** button on the One Date Donation Entry window, which displays the totals entered on the window, with subtotals by category.
- Fixed a bug in One Date Donation Entry, where if you did not enter any donations and clicked **Save**, you got an appropriate message, but then you were unable to make any entries.
- Enhanced the **Database** ⇒ **Import Data** routine to allow [importing](#) of an arbitrary number of years of data, and to allow importing the three Other Info fields for donors.
- Added a routine **Database** ⇒ **SQL Select**, which allows you to basically create very simply formatted ad-hoc reports and data extractions, if you know the appropriate [SQL](#) statement to use.
- Added a **Save SQL** button to the [Reports](#) viewing window, which allows you to save the SQL Select statement used to create that report to a file. This can then be retrieved, modified, and re-used in the **Database** ⇒ **SQL Select** window. (Note: This was removed in version 3.38, and replaced by the [memorized reports](#) facility.)
- Fixed a bug that only happened for some users. Under **Reports** ⇒ **Donor**, all of the following reports had a bug: **Donation Info** ⇒ **Sort by Name**, **Donation Info** ⇒ **Sort by Amount**, **Donation Info** ⇒ **Totals and Pledges by Name**, **Mailing Labels**, **Mailing Labels with Member/Envelope #**, and **Old Donors**. The bug was that on all of these reports (for those users who saw the bug) only donors for whom you had selected a value of Category 1 showed up.

- Fixed a bug introduced in version 2.30: If you used **Maintenance ⇒ Change Receipt Password**, the new password for the receipts was in effect during that run of DONATION, but when you closed DONATION and re-started it, the previous password re-appeared.
- Fixed a bug in **Maintenance ⇒ Change Year**: If your lists of Donor or Donation Categories were different between the two years, the new lists didn't necessarily appear after you changed years. (They appeared if you exited and restarted DONATION.)
- Fixed the entry of Member/Envelope numbers so that only numbers (no letters etc.) can be entered. I believe that everyone only uses numbers, but if you do enter letters, you get error messages in other parts of the program, for example in reports that are sorted by Member/Envelope number.
- Changed how entering new donors, deleting donors, and updating either the name or the envelope number of existing donors is done. Previously, after any of these actions the whole Donor List on the left-hand side of the main window was re-read from the database, which could take some time if you had a lot of donors. Now, that list is just updated appropriately for the change you have made, without having to re-read it from the database, which should be much quicker.
- Changed **Reports ⇒ Donation ⇒ One Date Details with Member/Envelope #** back to portrait mode, by narrowing some of the columns a bit. It had been changed to landscape mode in version 2.30.
- Fixed a silly bug in the Donations display on the main window. For a donor with no donations, the display said "Total for 01/01/1900" at the bottom of the window.

Fixes in Version 2.30 (February 30, 2001):

#### Major Changes

- Added a number of fields to the database structure, including Postal Code and Annual Pledge Amount to the Donors, and Cheque Number / Paid By to the Donations.
- Separated some of the settings from **Maintenance ⇒ Organization Info** out into a [new option Maintenance ⇒ Receipt and Letter Options](#).
- Significantly changed the layout of the [receipts for U.S. users](#), including removing the tear-off duplicate section, and adding the wording "Pursuant to Internal Revenue Code requirements for substantiation of charitable contributions, no goods or services were provided in return for the Tax Deductible contributions" to each receipt.
- Added a facility **Database ⇒ Import ChurchMouse Donors** that allows users of the program ChurchMouse version 3.0 from Ferra Dynamics (which is no longer in business) to import the donor information. ChurchMouse no longer works in 2001, and will not be fixed, so this is a convenience for those who are finding themselves forced to switch from it. (Note: This option was later removed in version 3.00, as it was no longer needed.)
- Added a [new way of inputting donations](#), particularly for churches with weekly collections. You use **File ⇒ One Date Donation Entry** to bring up a list of all donors, where you can just go down the list and enter the amount for each donor that gave on that date, then save them all in one step. (You can also enter donation categories and cheque number / payment method if you wish.) Note: you cannot edit donations for a given date with this feature; you can only enter them the first time.
- Added a new option **Database ⇒ Switch Databases** which allows you to [maintain databases for more than one organization on the same computer](#). Using it you can easily create new empty databases for additional organizations, record existing databases, and switch between using the different databases.

#### Other Changes Affecting Receipts

- Added an option to **Maintenance ⇒ Receipt and Letter Options** to not print the individual donation details on the bottom half of the receipt, instead printing only the category totals.
- Added an option to **Maintenance ⇒ Receipt and Letter Options** to show the Cheque No / Paid By field for each donation in the donation details area of the receipt.
- Added an option to **Maintenance ⇒ Receipt and Letter Options** to remove the line of dashes between the sections of the receipts, for those who have pre-perforated paper and don't want to see the dashes as well. (Does not apply to U.S. users.)
- Fixed a small bug on the receipts. If a donor has no Member/Envelope Number, it was still printing a prompt for "Member #" on the printed receipt even though it did not display when you looked at it on-screen. Now that prompt is eliminated in the printout as well, unless of course the donor does have such a number.
- If the Cheque Number / Paid By field for a donation contains the value "Pre-Received" (which can be selected from a drop-down list) then that donation will never be included in a receipt. This handles money that came in through 3rd parties that already issued a receipt.

#### Other Changes

- When the Donor List is being used to [find donors](#) on the main window, you could always scroll quickly to a Donor by envelope number by typing that number using the number keys on the top row of the keyboard. However, using the keypad keys (with Num Lock on) did not work. Now that also works.
- Added a facility **Database ⇒ Import Donors** that allows you to [import donors exported from other programs](#), if the file is in tab-separated text or dBase 2 or 3 format.
- Added a new option within **Letters ⇒ Mass Mailing** that allows you to have it merely export the data to a format useable by your word processor, without actually doing the [mail merge](#) itself. This is useful for those people experiencing problems with the Mass Mailing feature, or if you just want to experiment with it within your word processor.
- Added a hidden option for debugging problems with mail merges. If you have unusual problems with mail merges, contact us and we will instruct you in how to use this option.
- Changed the option **Database ⇒ Import Data** to make it more generic, so that it can [import suitably-formatted data](#) from other charitable donation programs. It was previously called **Database ⇒ Import DOS Data** and was only for importing data from the old DOS version of our DONATION program.
- Rearranged the elements on the main window, so that the Donations area is now as wide as the whole window, and the Donor Details area expands when you are editing donors to be the full height of the window, so that you don't have to scroll to see all of its fields. The heading above the Donations area is now "Donations for *Firstname Lastname*".
- Added a new report **Reports ⇒ Donor ⇒ Donation Info ⇒ Totals and Pledges by Name** that lists all donors with their donation amounts and annual pledge amounts for the current year.
- Added a new report **Reports ⇒ Donation ⇒ Category Totals, One Page per Donor** that lists totals by donation category, within a specified range of dates, for each donor, one page per donor.
- Modified most reports listing detailed donations to also include the cheque number / paid by field.
- Modified all reports that include addresses to include the postal code. For labels and receipts, if address line 3 is filled in, the postal code prints after it, separated from it by two spaces. If address line 3 is not filled in, the postal code prints on its own line.
- Modified some reports that one user reported were printing blank pages between each real page of the report, on an Epson bubble jet printer. This usually happens if the report



is too wide for the specific printer. I made these reports a bit narrower which will hopefully eliminate the problem.

- Fixed a nasty bug in **Letters ⇒ Mass Mailing** that seemed to happen only on some versions of Microsoft Word. The bug caused the merged data to be completely incorrect, with the wrong fields going in the wrong places. (This happened on one copy of Word 97, SR2, but didn't happen on another copy!)
- Fixed a dumb behaviour where after adding a New Donor, the Donor List on the left was not automatically scrolled to display the new donor.
- Fixed a dumb behaviour where after Deleting a Donor, the Donor List on the left always scrolled back to the 1st donor. Now it tries to scroll to the same place as it was, with the next donor after the deleted one highlighted.

#### Fixes in Version 2.29 (November 5, 2000):

- fixed a bug in **Letters ⇒ Mass Mailing**. It did not work with Microsoft Word 97, because it gave an error message and died. It did work with Word 2000 (subject to the following two issues) or with WordPerfect.
- fixed a weakness in **Letters ⇒ Mass Mailing** when used with Microsoft Word - it more or less required that you have Microsoft Excel installed on your machine as well. (It behaves very strangely if not.) It now exports the mail merge data in CSV (comma-separated Value) format rather than Excel format, so that Excel is not required.
- fixed another weakness in **Letters ⇒ Mass Mailing** when used with Microsoft Word - if your copy of DONATION is not installed in the same directory as our copy is (which will indeed be a problem in most cases) you get strange behaviour when you use it. (It comes up with a dialog box prompting "Open Data Source" or something like that.)

#### Fixes in Version 2.28 (October 15, 2000):

- added in new menu option **Receipt ⇒ Filtered Donors** which allows you to [generate receipts](#) for all donors and donations which satisfy certain criteria. The criteria can be based on donor or donation categories, the values in the three Other Info fields, or a minimum amount for individual receipts. This last option is useful for organizations in the U.S. who don't have to issue receipts for amounts under \$250.
- added in new menu option **Reports ⇒ Donation ⇒ Unreceipted Donations**, which lists all donations that have not yet had receipts issued for them. This might be used in association with the **Receipt ⇒ Filtered Donors** option to check that donations have not been skipped for which receipts should have been issued.
- changed menu option **Receipt ⇒ Current Donor Duplicate** to be **Receipt ⇒ Current Donor Duplicate/Corrected**. [This option](#) now will correct the donation amount if it has changed (because you deleted a donation that was part of it), and print "Corrected Receipt" on the receipt.
- added in new menu option **Receipt ⇒ Duplicate/Corrected Receipt by Number**, which is like the previous option, except that you don't have to be pointing at the right donor and donation to use it. Rather, it prompts for the receipt number to reprint. This is needed when you have deleted the only donation included in a receipt, so the new receipt total is \$0.
- added a new report **Reports ⇒ Receipt ⇒ Incorrect Receipts** that shows receipts where the receipt amount does not match the total of donations included in the receipt, because a donation was deleted. You need to issue a corrected receipt for each such incorrect one, to make it correct again. *All users of versions prior to 2.28 should run this report to make sure they don't have any incorrect receipts that need fixing!*



- added an option in **Maintenance** ⇒ **Organization Info** to specify that you are a U.S. (United States) user. If [this option](#) is selected, then the charitable Registration Number is omitted from the [receipts](#), as it is not used or required in the U.S.
- added an option in **Maintenance** ⇒ **Organization Info** to [specify the Word Processor](#) that you are using. You can choose between Microsoft Word 97 or higher and Corel WordPerfect (version 7 or higher). This is used for mail-merge letters (see below).
- added in a new main menu **Letters**, which has the [options](#) **One Letter** and **Mass Mailing**.
- **Letters** ⇒ **One Letter** allows you to [send a letter](#) to the currently selected donor, merged via your word processor (Microsoft Word 97 or higher or Word Perfect 7 or higher). The letter can contain just Donor information, Current Donation information, Total Donations information for that donor, or Selected Receipt information for that donor, allowing you to reprint a receipt in your own format rather than the one included in the program. You are given an option to edit the letter before it is printed.
- **Letters** ⇒ **Mass Mailing** allows you to [send the same mail-merged letter](#) to some or all of your donors, again allowing you to include Donor, Donation, or Receipt information in the letter. Again, this can be a way to reprint and send out receipts in your own format, as well as doing other mass mailings to donors.
- fixed a bug in **Maintenance** ⇒ **Change Year** ⇒ **Next Year**. When creating the data for a new year by copying donors etc. from the previous year, it did not copy any of the Member/Env. #, Other Info 1, Other Info 2, Other Info 3 or Comments field data to the new year's donor information.
- changed **Help** ⇒ **Read Manual**, which previously gave you a choice to read the Microsoft Word or the WordPerfect version of the manual, to instead read a local copy of the HTML (web page) version of the manual. This requires that a web browser (for example Microsoft Internet Explorer or Netscape Navigator) be installed on your system, but you do not need to have an active Internet connection. The Word and WordPerfect versions of the manual are no longer distributed with the program, but both of those programs will read the HTML version (donation.htm) if you do want to load it into a word processing program. The HTML version of the manual has been much improved in style, so that its appearance is much more similar to that of the old Word or WordPerfect versions.
- this isn't exactly a change to the program, but you can now find the program's web site at [www.FreeDonationSoftware.org](http://www.FreeDonationSoftware.org). The old address of [www.interlog.com/~dcoops/donat32.htm](http://www.interlog.com/~dcoops/donat32.htm) still works (and in fact entering [www.FreeDonationSoftware.org](http://www.FreeDonationSoftware.org) in your browser takes you there) but the new address is easier to type and to remember. The web site has also had a major redesign and should now be much easier to use and navigate.
- changed most reports so that they include a count of Donors or Donations (depending on what the report is reporting on) as well as totals of dollar amounts.
- started a new tradition of including links, when appropriate, from elements in this Revision History section to the relevant section of the help file or manual, to help you find further details about new features

#### Fixes in Version 2.27 (April 23, 2000):

- added bilingual (French/English) receipts as an option for users in Quebec or who have a national donor base; you activate it by using **Maintenance** ⇒ **Organization Info** and checking off the new "Bilingual Receipts" checkbox.
- added a new report **Reports** ⇒ **Donation** ⇒ **One Date Details with Member/Envelope #**, which is like **One Date Details** (which can be used to double-check one day's data entry) except that it includes, and is sorted by, the Member/Envelope number

- slightly renamed and re-ordered the options on the **Receipt** menu for clarity (no functional changes)

Fixes in Version 2.26 (February 21, 2000):

- changed Donations display on the main window so that the Total and One Date total never scroll off the screen if there are several donations
- changed Donations display on the main window so that donations that have already been receipted are grey and cannot be edited
- changed **Reports** ⇒ **Donor** ⇒ **Donation Info** ⇒ **Sort by Member/Envelope Number** so that it sorts on the Member/Envelope # numerically rather than alphabetically. This can eliminate strange sort orders if the Member/Envelope #'s aren't all the same length.
- added a new report **Reports** ⇒ **Donor** ⇒ **Addresses by Member/Envelope Number** which gives the Member/Envelope #, name, address, and phone for all donors, sorted numerically by Member/Envelope #.
- added a new report **Reports** ⇒ **Donor** ⇒ **Mailing Labels with Member/Env #**, which prints mailing labels for all donors, with the member/envelope number included on the first line. These can only be printed on 4" x 1" labels.
- added a new report **Reports** ⇒ **Donation** ⇒ **Details, One Page per Donor**, which lists the same details for each donor as appear on the receipts. You get to specify a range of dates when you generate this report. It could thus be used (for instance) for quarterly handouts to your donors to show them their givings.
- on receipts, added the donor's name to the heading for the last section, "Summary by Category". That way if the receipt goes onto a 2nd page, the donor's name will at least be visible somewhere on that 2nd page.
- fixed a bug in the automatic generation of member/envelope numbers. They are generated automatically by either using **File** ⇒ **New Member/Env. #** or right-clicking in the Donor's Member/Env. # field and selecting **New Member/Env. #** from the popup menu. This then automatically fills in the next available member/envelope number in the field. Unfortunately it would only work correctly if your numbers were less than about 30000. For larger numbers, it would fill in a completely incorrect number. This has now been fixed. It now works for numbers up to about 2147000000.

Fixes in Version 2.25 (January 10, 2000):

- fixed a bug in entering donations. If a donor already had receipted donations, it would not let you enter additional donations for them for the same year.

Fixes in Version 2.24 (January 6, 2000):

- fixed a bug in the generation of receipts. If a donor had a lastname but no firstname (for example an organization), the name would not be printed on the receipt at all.
- changed **Receipt** ⇒ **Current Donor Sample** so that if you are using a Receipt Password, you do not have to enter it to create a sample receipt.

Fixes in Version 2.23 (January 2, 2000):

- added a new option for receipts, **Receipt** ⇒ **Current Donor Sample**, which generates a receipt with "Sample Only" printed as a watermark in the background, and does not save the receipt information back to the database. This can be used for testing the program.
- added a new report, **Reports** ⇒ **Donation** ⇒ **By Donor By Category** which subtotals each donor's donations by donation category, and compares the current and previous years
- added display of any Filter you put on a report on the report's header, unless you have also put on a special Sort

- changed the entry of dates for donations, so that the date now defaults to the previous date you entered during this run of the program
- add a new total called "One Date" at the bottom of the Donations area, that totals the amounts of the donations made by the current donor on the date of the currently highlighted donation
- added a second size of mailing labels, 2.625" x 1". The previous size was 4" x 1".

#### Fixes in Version 2.22 (November 24, 1999):

- changed receipts so that they will fit on (some) tear-off forms and can be used with window envelopes
- changed the name of **Reports ⇒ Donation ⇒ One Date** to **Reports ⇒ Donation ⇒ One Date Details**
- added a new report, **Reports ⇒ Donation ⇒ One Date Summary**, which gives totals by category for donations entered with one date
- changed **Reports ⇒ Donation ⇒ Summary by Category** to allow you to specify a range of dates for it to report on

#### Fixes in Version 2.21 (October 4, 1999):

- added capability to use a bitmap signature on the receipts. It must be called `signatur.bmp`, and be 166 x 39 pixels, or a multiple of that size.
- added an optional password for generating receipts
- added some invisible fields to the Donor Mailing Labels report, so that you can print selected mailing labels based on donor categories, or the 3 "Other Info" fields, using the Filter button.
- added the Member/Envelope Number (if there is one) after the member's name on the receipts
- changed the receipts to use two columns for printing the donation details, which takes less room if there are a lot of donations covered by the one receipt
- changed the receipts to add a section at the bottom summarizing the donations by category
- changed the spacing on the receipt some (one user had reported problems with overlapping fields)

#### Fixes in Version 2.20 (August 25, 1999):

- added Member/**Envelope** Number field to Donor Details. Can insert next available number easily by right-clicking in the field, and picking the menu option "New Member/Env #", or by picking **File ⇒ New Member/Env #**. Can search on it in the Donor List area by typing numbers. (Search on names by typing letters.) Can also search on it with the menu option **File ⇒ Find Donor**.
- added **Reports ⇒ Donor ⇒ Donation Info ⇒ Sort by Member/Env #**, which is like the other reports on this sub-menu except it lists all donors, and includes their Member or Envelope #'s, and is sorted by those numbers
- added Comments field to Donor Details. Can edit it in place (if you scroll down into that area), or in a larger window by right-clicking, and picking the menu option "Edit Comments", or by picking **File ⇒ Edit Comments**.
- added Other Info 1, Other Info 2, and Other Info 3 to Donor Details. These fields can be called anything you like (such as "Email" or "Fax"), by using **Maintenance ⇒ Organization Info**, and filling in the field names in the Other 1 Label, Other 2 Label and Other 3 Label fields.
- added support for printing a logo on the receipts. To do so, put a bitmap file named `logo.bmp`, with width 150 pixels and height 60 pixels, into the program directory (usually c:

\Program Files\Donation). If there is no such file, it will still print fine. If it's there, it prints in the top right corner of the page.

- fixed bug: once you had set a donor's Category 1 or Category 2, you couldn't reset it to have no category
- fixed bug: you were only warned about entering the same donor name twice if you were inserting a new donor, not if you were editing an existing one
- fixed bug: if you create a report, such as **Reports** ⇒ **Donation** ⇒ **Current Donor**, that has no data, then (after giving a message to that effect) the program dies

Fixes in Version 2.14 (June 8, 1999):

- fixed printing of receipts with over 16 individual donations listed, which printed strangely on a 2nd page
- as a result of this fix, had to limit printing of receipts to 500 per batch. (You can print receipts for as many donors as you have, by printing multiple batches.)
- fixed the installation program to recognize when the version of Microsoft ODBC might not be new enough to run DONATION, and exit with a message about how to update ODBC if that is the case

Fixes in Version 2.13 (March 24, 1999):

- fixed some reports that were printing extra blank pages on some printers
- changed so that it warned you if you made the mistake of entering your organization's charitable number in the charitable number field for a donor
- changed so that it warned you that the option should not generally be used if you checked the "Allow January" field in the Organization Info.

Fixes in Version 2.12 (February 18, 1999):

- changed Database ⇒ Backup so that it works even if the database file has been moved from its original installed directory
- fixed bug in Database ⇒ Backup that caused it to fail in some circumstances when backing up to a diskette drive (A:)

Fixes in Version 2.11 (February 4, 1999):

- fixed a bug: if you went to create a New donor, and Canceled the add, then went to edit another donor, and Saved your changes, you might get erroneous questions about adding another donor with the same name
- fixed a bug that only happened if you converted your data from the old DOS version of the DONATION program: the first donor ever entered could not have donations added for it.
- changed searching on the Donor List by typing letters, so that if you type another letter and it still matches the current donor, it doesn't move, even if the next donor matches it too
- changed so that after you finish adding or editing a donor or donation, it moves the "focus" back to the Donor List, so that you can start typing letters to find another donor

Fixes in version 2.1 (January 26, 1999):

- added Sort and Filter feature to the Reports viewing window
- added a report on donors which are themselves charities (required for Revenue Canada reporting)
- various improvements in the manual
- added more options to the Help menu
- changed the hotkey for creating a New Donor from F1 to F3, so F1 could be used for its standard purpose of opening the Help Contents

- fixed a bug in moving from one year's data to the next for the first time, if donor categories had been used
- fixed a bug when creating two donations for the same donor in a row, which caused an incorrect warning message
- fixed a bug on first starting up the program where if you did not start it for the current year, it got temporarily confused

Version 2.0 was the first release of the Windows 95 version, released in early January 1999.

Version 1.0 was a DOS version of this program, first released in 1994.

By the way, if anyone is reading the above lists of changes and bugs and thinking to themselves, "Boy, that program is really buggy!", we do have a response. In our experience, all programs of any significant complexity have bugs in them. Unfortunately (to our way of thinking) most software companies do not choose to give information on fixed bugs to their customers, or they make it very difficult to get that information. As a Quaker, I have a strong belief in the truth, and feel it is only honest to tell you what we have fixed. Another way of looking at this is that we are very responsive to feedback from our users, as each of these was fixed almost as soon as we heard about it.

## 26.6 Bugs / Features

All programs of any complexity probably have bugs in them, and this one may not be an exception despite our best testing and the experience of thousands of users. In addition, some aspects of the program that one person considers to be "features" may be considered to be bugs by another person. Please [contact us](#) if you believe you have found any bugs in the program, or wish to suggest new features.

The Quaker Meeting that first ran DONATION, Toronto Monthly Meeting, encountered one problem with the old DOS version of the program around when they tried to start entering 1995 after the end of 1994. Their data appeared to become damaged, the receipts didn't print properly, and the data inside the program looked wrong. This turned out to be a bug, which I fixed. When I restored a data backup from about a week before the problem appeared, everything was fine. I mention this not because I expect there will be a similar problem in the current version, but rather to reinforce the fact that you must back up your data regularly with the **Backup/Restore** = **Backup Database** [menu option](#).

## 27 TECHNICAL INFORMATION

### 27.1 Technical Information

This section of the manual is only for very curious technical people.

The program is written in the programming environment Appeon PowerBuilder 2019. The database that the data is stored in is embedded Firebird version 2.5. (Embedded Firebird is used for the Standard and legacy Lite versions of DONATION; the full server version of Firebird is used for the [Local Network](#) and [OnDemand](#) versions of DONATION.)

Some earlier versions of DONATION used earlier versions of PowerBuilder. Versions prior to version 3.00 used the Sybase SQL Anywhere or Adaptive Server Anywhere database.

#### Accessing your Data with Programs other than DONATION

If anyone is ambitious and wishes to access the data in the DONATION database directly, the definitions of the SQL tables in it are in the file TABLES.SQL in the program's main directory, which is usually C:\Program Files\Donation or C:\Program Files (x86)\Donation. (Users of the [OnDemand](#) version cannot access that directory - just [contact us](#) if you need a copy of that file.) There is a login that you can use for read-only access to all of the tables, which is username "donation\_reader", password "reader". There is an ODBC datasource set up on installation, called "DONATION\_FB\_READONLY", which already has this login defined in it.

**Note:** To use the DONATION\_FB\_READONLY datasource from other programs, you may first have to copy the three files icudt30.dll, icuin30.dll, and icuuc30.dll from the program's installation directory (normally C:\Program Files\Donation, or C:\Program Files (x86)\Donation on 64-bit computers) to the Windows System directory (generally C:\Windows\System32).

Also, if you have the legacy Lite or Standard versions of DONATION, you may not be able to access data through that datasource while DONATION is running at the same time. That should not be a problem if you have a Network version of DONATION.

Prior to version 3.30, the program itself used the ODBC datasource "DONATION\_FB", with a different username and password. From version 3.30 on, it works without using that ODBC datasource, though the datasource does still exist. Sorry, we do not give out the username and password for that datasource, because we do not want you to be modifying data other than by using the program! That would be very likely to cause errors. A better way to make custom changes to the data, with our assistance, is by using the **Database ⇒ SQL Select menu option**.

#### Note for users of Multiple DONATION Databases

If you maintain multiple databases in DONATION for multiple organizations, via the **Database ⇒ Switch Databases menu option**, and you want to use the DONATION\_FB\_READONLY ODBC datasource, please be aware that starting in version 3.30, it will always point to your main database, DONATION4.DB, unless you explicitly change it. (Previous versions of DONATION changed it as you switched databases, but that required running as an [Administrator](#), which DONATION no longer does.) If you need to modify that datasource yourself, go to Windows Control Panel, then Administrative Tools, then "ODBC Data Sources (32-bit)" if that option is there, or otherwise "Data Sources (ODBC)", then switch to the



System DSN tab, click on DONATION\_FB\_READONLY, and click Configure. You will be able to change the Database name there.

Unfortunately, there is a complication getting to the Data Sources (ODBC) tool to edit the data sources on some computers. If your computer has a 64-bit processor, and there was not an option for "ODBC Data Sources (32-bit)" in the Administrative Tools, you will not find DONATION\_FB\_READONLY by following those instructions above. Instead, use the Run option from the Windows Start menu, and run the following, without the quotes: "C:\windows\syswow64\odbcad32.exe". (In some versions of Windows, there is no Run option - enter that same command in the "Search programs and files" entry box in the Start menu.)

## 27.2 Referential Integrity

The DONATION program was very carefully programmed to protect you against silly errors which can cause big problems in the future. (Referential integrity is just a fancy Computer Science term for making sure that data in all of your related data files matches up sensibly.)

The following are never allowed:

- deleting a donor who has made donations this year
- deleting a donation category in which there are donations this year
- deleting a donor category that has already been assigned to donors this year
- changing a donation which has already had a receipt created for it (you may delete it, after confirming that is really what you want to do)
- entering donation dates that aren't in the current calendar year
- leaving important information blank, such as last name, or donation date, amount, or category
- entering two donors with the same Member/Envelope #

The following are allowed, but only after warning messages which give you a chance to change your mind about them, because they are questionable practices:

- changing the name of a donor who has made donations this year (because you may be changing them to be somebody else!)
- deleting a donation which has already had a receipt created for it (you would want to do this if a donation had been entered in error, and you needed to print off a [corrected receipt](#))
- changing the name of a donation category in which there are already donations
- changing the name of a donor category that has already been assigned to donors
- creating two donors with the same first and last name (if you do have this situation, be very careful when entering their donations to check the address, so you know which is which!)

## 28 HOW DO I?

### 28.1 How Do I?

This section contains tips on how to do certain activities with the software, which may not be immediately obvious from the manual so far. If you notice anything that you have to puzzle out how to do, please let us know so we can add it to this section.

[Change the Donor of a Donation](#)

[Fix up Duplicate Donor Names](#)

[Move the Program from One Computer to Another](#)

[Transfer your Data between Computers](#)

[Use the Database on a USB Memory Key](#)

[Determine what Version of DONATION I have](#)

### 28.2 Change the Donor of a Donation

If you have entered a donation, and later notice that you have put it in for the wrong donor name, you unfortunately have to delete the donation and re-enter it for the correct donor.

If the donation had already been receipted (it had something in the Recpt # column), you will have to create a [Corrected Receipt](#) for it.

### 28.3 Fix up Duplicate Donor Names

Sometimes you may find that over the course of a year you have entered the same donor's name more than once (perhaps with slightly different spellings) and have perhaps entered donations under both versions of the name. You cannot just delete one of the names immediately, because they already have donations.

You can fix this with the **Database** ⇒ **Merge Duplicate Donors** [menu option](#).

You can check periodically for possible duplicate entries of the same donor with the **Reports** ⇒ **Donor** ⇒ **Potential Duplicates** report, although that also finds names that sound similar.

### 28.4 Move the Program from One Computer to Another

For various reasons you may need to move DONATION from one computer to another. This would include changing staff (such as Treasurers) in your organization, upgrading to a new computer, or rebuilding your computer after a hard disk crash. (That's not technically another computer, but since the hard disk has been rebuilt or replaced, it has the same effect as if it was another computer!)

Your **first step** is to check which version or release number and named version of DONATION is running on the **old** computer, with the **Help** ⇒ **About DONATION** menu option in it. The named versions are Standard or Standalone, Lite, Local Network Server, Local Network Client, and OnDemand. If for any reason that is not possible, you can [contact us](#) to

ask what our records show. That information will be needed in various parts of these instructions below.

If you have the OnDemand Version, and are moving from one computer running that version to another computer running the same version, please see [Move the OnDemand Version](#) for instructions instead of the rest of this page.

Not all of the steps below are required if your old computer running DONATION is no longer available. See [Reinstalling DONATION](#) for instructions instead, in that case.

As long as you are up to date on your payments for DONATION, or are using the free legacy [Lite](#) version, there is no charge for this - the program is licensed to your organization, not merely for a specific individual or computer. Of course, you can also do this while you are still in your initial 60-day evaluation period plus grace period.

### Simplest Instructions

Here are the simplest possible instructions for moving any version Standard or Lite Version to a new computer, as long as you have only one database:

1. Make sure you have a [database backup](#) from the old computer available.
2. Download and install your current version onto the new computer, from the DOWNLOAD page on the website at <https://software4nonprofits.com/download-all/>.
3. When you run that program, choose an appropriate option on the [Startup Options](#) screen to restore that backup from the old computer, and follow the prompts to do so.
4. Unless you are using the Lite version (which doesn't need license keys) or you are still in the initial 60-day evaluation period plus grace period, you will need a license key. You are entitled to it as long as you are paid up for email support and upgrades. In those cases, request the license key or follow the prompts to let the program automatically retrieve it.

Those instructions cover most simple cases, but for more details and full instructions for more complex cases, please see the following sections.

### Detailed Instructions

1. If **all** of the following points are true on the copy of DONATION on the old computer, you should upgrade that computer before you continue:
  - your version or release number of DONATION is earlier than version 3.66, and
  - you are using a version other than the free Lite version, and
  - you use either mail-merge receipts or letters, or you have any memorized reports.

If those three points are **all** true, you upgrade the old computer by downloading and running the appropriate named installation program (Standard etc.) for your version of DONATION from the DOWNLOAD page on the program's web site at <https://software4nonprofits.com/download-all/>. (This is required to make sure that any mail-merge receipts and letters, and memorized reports, get transferred to the new computer in the following steps.)

Be sure to run that downloaded installation program to upgrade DONATION on the old computer, and also run DONATION after the install, which will pick up your mail-merge receipts and letters, and memorized reports, and save them in your database.

2. On the new computer, download the appropriate named installation program for your version of DONATION from the DOWNLOAD page on the program's web site, at <https://software4nonprofits.com/download-all/>. (If you have a saved copy of the most recent full installation file for the program, as downloaded in the previous step, you can use that.)

Run that downloaded installation program to install DONATION on this new computer. Do not run DONATION there yet.

**Note:** It does not work to just copy the DONATION program directories (C:\Program Files\Donation etc.) from one computer to the other. You must do the installation on the 2nd computer.

3. Copy your most recent database backup file, which may have names such as DONATION-YYYY-MM-DD.HH.MM.SS.DB.GBK, DONATION-YYYY-MM-DD.DB.GBK, or DONATION4.DB.GBK, from the old computer to the new computer. (The YYYY-MM-DD part of the backup filename, if present, represents the date the backup was made, and HH.MM.SS is the time.) Follow the instructions under [Transfer your Data between Computers](#) to do this, via one of the backup and restore methods. (That Help topic also gives other options, which are sometimes easier, of transferring the database between the two computers by using email backups or Internet backups.)

**Note:** If the old computer was running version 2.70b or earlier of DONATION, installed mid-2007 or earlier, its database file is named DONATION3.DB, not DONATION4.DB. In that case, you will need to [contact us](#) to convert the database to the current format for you.

As long as you have a regular backup or emailed backup (see [below](#)) available when you first run the newly installed DONATION program, when its first [Startup Options](#) window prompts you to answer whether you are a first time user, or you want to start by restoring a backup, you can select that second radio button option for restoring the backup, and clicking **OK**. Then follow the prompts to restore that backup. (See [Startup Options](#) for details.)

4. If you are using the **Database = Switch Databases** [menu option](#) to handle multiple databases on the same computer, you will also have to transfer backups of all of your other database files, named DONATION4.*something*.GBK, DONATION-YYYY-MM-DD.*something*.GBK, or DONATION-YYYY-MM-DD.HH.MM.SS.*something*.GBK, to the new computer.

In addition, you would first have to copy the file databases.txt from the [Data Directory](#) on the old computer to the Data Directory on the new computer, because it lists your databases. Alternatively, use **Database = Switch Databases** to set up new databases on the new computer with your additional database extensions, and then you can restore the transferred databases.

5. If you are using a paid version of DONATION (not the free Lite version, or free Standard version with no more than 50 donors with donations) and are not still in your initial 60-day evaluation period plus grace period, you need to retrieve or request the license key(s) for your database(s), if you don't already have current one(s), and install them. See [below](#) for

details.

6. If you are using a paid version of DONATION (not the free Lite version), and you plan to do any emailing from the program, e.g. of backups, or receipts or mail-merge letters, do the following. Go to the **Maintenance** ⇒ **Email Sending Configuration** [window](#), and if the configuration isn't already there and correct, configure it appropriately (the same on the new computer as on the old computer if it's for the same person, using the same email address, or as appropriately for the new program user's email if not).
7. If a new user is taking over the program, they should email their full name, email address and phone number to us at [info@software4nonprofits.com](mailto:info@software4nonprofits.com), so we can update the mailing list. Please also let us know whether the new user should replace the old one on the mailing list, or be added as a 2nd contact. When the program prompts you to register, as long as your organization has ever registered before (i.e. someone is on our mailing list), you can answer "Already Registered".
8. If the new user will also be the new person signing the charitable receipts, they need to change the Receipting Person field in the **Maintenance** ⇒ **Organization Info** [window](#) to show their name. If you wish to use a bitmap signature on the receipts (required, if you will be emailing receipts), and it is for a new person, follow the instructions under [Logos and Signatures](#) to install a new scanned signature for the new user.

That's it. The new computer should now have a copy of DONATION that is identical to the one on the old computer. Just continue your work on the new computer.

#### Note on Software Licensing

When you have DONATION installed on two computers for the same organization, you can apply the same License Key to both of them. See the section on [Software Licensing and Evaluation](#) for more details on License Keys. Alternatively, you can copy the file dons1.txt from the [Data Directory](#) on the old computer to the Data Directory on the new computer - it contains your licensing information.

If you don't have a copy of your license key saved, and copying over the dons1.txt file seems complicated to you, just re-request your license key from the Evaluation and Licensing window that comes up when you start the program. We will send it to you, as long as you have paid in the last 12 months. In some cases the program will prompt you to automatically retrieve the license key. If it does that, there will be no need to separately request the key. There is no additional charge for this license key, because as mentioned above, the license is for your organization, not per user or per computer.

The free Lite version does not use or need a license key.

If you are using a paid version of DONATION and have not paid within the last 12 months, you will need to pay the Annual Fee in order to be eligible for your license key.

#### Using Emailed Backups

Instead of using regular backups, created with **Backup/Restore** ⇒ **Backup Database**, and bringing them to the new computer on a USB memory key or in some other way, you can instead email the database backup to an email account that you can access on the new computer, via **Backup/Restore** ⇒ **Email Backup**. You then restore it with either a checkbox

option on the initial startup window (under the radio box for "I want to start by restoring a database backup ...", or after your initial setup as a new user, by using the **Backup/Restore** ⇒ **Restore Emailed Backup** menu option.

### Using Internet Backups

If the only backup you have access to is an Internet backup made from the other computer, it is possible to restore it, as long as you have a copy of the Unique ID that was used for those backups, and you know the Internet Backup Encryption Password that was used. If you do not have the Unique ID for Internet backups, contact [Support](#) to ask for it - as long as the previous user accepted the suggestion made when they configured Internet backups to email it to us, we will not have a copy of your password!

You can restore an Internet backup on the initial window that comes up when you run DONATION for the first time (see [Startup Options](#)), by choosing the 3rd radio button option, "I want to restore an Internet backup ...". If you miss that chance and instead start up as a new user, then once you get to the main window of the program, with its menu, you can select **Backup/Restore** ⇒ **Backup Frequency and Options** to [configure](#) Internet backups with your Unique ID and Internet Backup Encryption Password. After that, you can [restore](#) the latest Internet backup with **Backup/Restore** ⇒ **Restore Internet Backup**.

## 28.5 Reinstalling DONATION

For various reasons you may need to reinstall DONATION on a computer, when you have previously been using it on another computer, but that other computer is no longer available. Most commonly that would be if your computer died and was replaced or had its hard disk repaired or replaced.

**Note:** The steps are much simpler for the OnDemand version than for most other versions - see [Move the OnDemand Version](#) for details.

More steps are usually needed if the old computer running DONATION is still available. See [Move the Program from One Computer to Another](#) for instructions in that case.

As long as you are up to date on your payments for DONATION, or are using the free legacy [Lite](#) version, there is no charge for reinstalling - the program is licensed to your organization, not merely for a specific individual or computer.

To reinstall the program, you will need to follow a few steps:

1. You need to know which named version of DONATION you were running on the **old** computer, or that you want to choose now. If you aren't sure, you can consult the [Version Comparison](#) page on the website to understand the differences, or contact [Support](#) to ask us what version our records indicate you were running. The named versions are Standard or Standalone, Lite, Local Network Server, Local Network Client and OnDemand.
2. Download the appropriate named installation program for your version of DONATION from the [DOWNLOAD page](#) on the program's web site.

Run that downloaded installation program to install DONATION on this new computer.

3. Run DONATION. As long as you have a regular backup or emailed backup (see [below](#)) available when you first run the newly installed DONATION program, when its first [Startup](#)



[Options](#) window prompts you to answer whether you are a new user, or a returning user with a backup, you can select that second radio button option. That will allow you to restore that backup. (See [Startup Options](#) for details.)

4. If you were using the **Database** ⇒ **Switch Databases** [menu option](#) to handle multiple databases on the same computer, you will also have to restore backups of all of your other database files, named DONATION4.*something*.GBK, DONATION-YYYY-MM-DD.*something*.GBK, or DONATION-YYYY-MM-DD.HH.MM.SS.*something*.GBK, to the new computer.

In addition, you would first have to use **Database** ⇒ **Switch Databases** to set up new databases on the new computer with your additional database extensions, and then you can restore the transferred databases.

5. If you are using a paid version of DONATION (not the free Lite version), you need to request the license key(s) for your database(s), if you don't already have current one(s), and install them. See [below](#) for details.
6. If you are using a paid version of DONATION (not the free Lite version), and you plan to do any emailing from the program, e.g. of backups, or receipts or mail-merge letters, do the following. Go to the **Maintenance** ⇒ **Email Sending Configuration** [window](#), and if the configuration isn't already there and correct, configure it appropriately (the same on the new computer as on the old computer if it's for the same person, using the same email address, or as appropriately for the program user's email if not).
7. If a new user is taking over the program, they should email their full name, email address and phone number to us at [info@software4nonprofits.com](mailto:info@software4nonprofits.com), so we can update the mailing list. Please also let us know whether the new user should replace the old one on the mailing list, or be added as a 2nd contact. When the program prompts you to register, as long as your organization has ever registered before (i.e. someone is on our mailing list), you can answer "Already Registered".
8. If the new user will also be the new person signing the charitable receipts, they need to change the Receipting Person field in the **Maintenance** ⇒ **Organization Info** [window](#) to show their name. If you wish to use a bitmap signature on the receipts (required, if you will be emailing receipts), and it is for a new person, follow the instructions under [Logos and Signatures](#) to install a new scanned signature for the new user.

That's it. The new computer should now have a copy of DONATION that is identical to the one on the old computer. Just continue your work on the new computer.

#### Note on Software Licensing

When you have DONATION installed on two computers for the same organization, you can apply the same License Key to both of them. See the section on [Software Licensing and Evaluation](#) for more details on License Keys.

If you don't have a copy of your license key saved, just re-request your license key from the Evaluation and Licensing window that comes up when you start the program. We will send it to you, as long as you have paid in the last 12 months. There is no additional charge for this, because as mentioned above, the license is for your organization, not per user or per computer.

The free Lite version does not use or need a license key.

If you are using a paid version of DONATION and have not paid within the last 12 months, you will need to first pay your Annual Fes in order to be eligible for your license key.

#### Using Emailed Backups

Instead of using regular backups, that were created with **Backup/Restore ⇒ Backup Database**, you may instead have a backup created with **Backup/Restore ⇒ Email Backup**. You then restore it with either a checkbox option on the initial startup window (under the radio box for "I want to start by restoring a database backup ...", or after your initial setup as a new user, by using the **Backup/Restore ⇒ Restore Emailed Backup** menu option.

#### Using Internet Backups

If the only backup you have access to is an Internet backup made from the other computer, it is possible to restore it, as long as you have a copy of the Unique ID that was used for those backups, and you know the Internet backup encryption password that was used. If you do not have the Unique ID for Internet backups, contact [Support](#) to ask for it - as long as the previous user accepted the suggestion made when they configured Internet backups to email it to us, we will not have a copy of your password!

You can restore an Internet backup on the initial window that comes up when you run DONATION for the first time (see [Startup Options](#)), by choosing the 3rd radio button option, "I want to restore an Internet backup ...". If you miss that chance and instead start up as a new user, then once you get to the main window of the program, with its menu, you can select **Backup/Restore ⇒ Backup Frequency and Options** to [configure](#) Internet backups with your Unique ID and Internet backup encryption password. After that, you can [restore](#) the latest Internet backup with **Backup/Restore ⇒ Restore Internet Backup**.

## 28.6 Move the OnDemand Version (2)

**This topic is only for users of the [OnDemand Version](#) of DONATION.** All other users should go to [Move the Program from One Computer to Another](#) for full instructions. If you aren't positive which version you have, go to the **Help ⇒ About DONATION** menu option in the program and check the text under the version number in the window that appears.

For various reasons you may need to move the OnDemand version of DONATION from one computer to another, or add it to an additional computer. This would include changing staff (such as Treasurers) in your organization, upgrading to a new computer, or rebuilding your computer after a hard disk crash. (That's not technically another computer, but since the hard disk has been rebuilt or replaced, it has the same effect as if it was another computer!)

The instructions in this page are also not relevant to switching from the OnDemand version to any other version of DONATION (covered [here](#)) or from any other version to the OnDemand version (covered [here](#)).

As long as you are up to date on your payments for DONATION, and thus entitled to log into your OnDemand Version, there is no charge for this - the program is licensed for any number of users in your organization, not merely for a specific individual or computer.

To move the program, you will need to follow a few steps:

1. On the new computer, download and install the OnDemand Client program from the OnDemand page on the program's web site, at <https://software4nonprofits.com/pricing/donation-cloud/#step-2>.
2. Just run that client program and login with your usual user name and password.
3. The only other thing that might be required, if this is for a new user, is for the Site Administrator for this database to set up a login for that new user, in two places - see OnDemand [User Management](#) for details.

## 28.7 Transfer your Data between Computers

Some users may choose to install the Standard or legacy [Lite](#) versions of DONATION on two or more computers (for instance, one at work and one at home) and transfer their data back and forth, in order to get work done at home, or for other reasons. That is technically possible and quite easy, and as long as you carefully arrange that changes are only made on one computer at a time, and the database is transferred back to the other computer before any changes are made on it.

**Please note that there is no way to merge entries from two computers!**

For paid users of the Standard version, no additional payment is required for this setup - you do not have to pay for additional users. (Of course, no payment is required at all if you are still evaluating the program, or using the free Lite version.)

There are also several other options for multiple users accessing DONATION, detailed on the [Multiple User Options](#) page, including the [OnDemand Version](#), the [Cloud Storage Service](#), or using the [Local Network Versions](#) of DONATION. This page is only about the first option on that page, with multiple installations of the Standard or Lite version.

**The [OnDemand Version](#) or the [Cloud Storage Service](#) are almost always better options than this one, as long as you have consistently reliable high-speed Internet on all computers on which you will be installing DONATION.**

**Note:** If you do not yet have DONATION installed on the other computer, or want to permanently transfer the program to another computer, please see the Help topic [Move the Program from One Computer to Another](#) to get you started.

### Basic Process

When you are finished using DONATION on one computer (I'll call it Computer A), use one of the four possible backup methods (detailed below) to make a backup of its database, and get that backup to the other computer (Computer B). On Computer B, restore that backup.

When you want to transfer your database back to Computer A again, assuming you have made some further entries on Computer B (not just looked at data and reports), just reverse the process. Make a backup on Computer B, get it to Computer A, and restore it on Computer A.

Obviously, you have to be really careful if you are transferring databases between computers. Don't get confused and restore the wrong database on the wrong machine etc. so you lose some of your work. (The program does warn you if you are trying to restore a backup with only older donation data than what is in your current database, however.) Also, make sure you make other backups on other storage media for additional security. Those additional backups also give you something to go back to if you mess up, or if your backup goes bad, etc.

Using the [Cloud Storage Service](#) largely prevents the dangers of losing your work if you lose track of who has the official copy of the database that can be changed, or you restore the wrong backup, and is also more automated.

The following sections explain how to transfer the database from Computer A to Computer B using one of three methods. To transfer it back, just reverse the instructions as explained above!

#### Method 1: Use Regular Backups

This is the method to use if you do not have high-speed Internet access on both computers, and/or you do not want to entrust your encrypted database backup to email transmission over the Internet, or secure storage on the Internet.

On Computer A, use the **Backup/Restore** ⇒ **Backup Database** [menu option](#) to backup the database file (DONATION4.DB, which gets backed up to a file named DONATION4.DB.GBK, DONATION-YYYY-MM-DD.DB.GBK, or DONATION-YYYY-MM-DD.HH.MM.SS.DB.GBK, where YYYY-MM-DD is replaced by the backup date and HH.MM.SS by the time) to a transportable medium such as a USB memory key or a writeable CD.

Bring that backup over to the other computer (Computer B). Start DONATION, and use the **Backup/Restore** ⇒ **Restore Database** [menu option](#) to restore the database from the backup, which copies it over top of the existing database on that computer. (Alternatively, you can start the restore by just double-clicking on the backup file, and following the prompts that come up.)

#### Method 2: Use Email Backups

If you have access to email on both computers, you can use the **Backup/Restore** ⇒ **Email Backup** [menu option](#) to email an encrypted backup from Computer A to an email account accessible from Computer B. Then on Computer B, follow the instructions in that email, to [restore](#) it.

#### Method 3: Use DONATION's Internet Backups

This is perhaps the easiest ongoing method, once you have completed a bit of initial setup.

You first have to [configure](#) Internet backups, and also ensure that both computers have the same Unique ID for Internet backups. The users on both computers must also know and use the same Internet backup encryption password. (See [this section](#) of that same configuration Help page to understand how to do that.)

Once it is configured, every regular backup on either computer will be followed by an Internet backup. So, make a [backup](#) on Computer A. Inform the user on Computer B that it is there,

and they can then restore it with the **Backup/Restore ⇒ Restore Internet Backup** [menu option](#).

#### Method 4: Backup to a Cloud Storage Location

This is distinct from DONATION's own [Cloud Storage Service](#)!

Instead, what it is referring to is saving your regular backups (as in Method 1 above) on a 3rd-party cloud storage location such as Dropbox, Google Drive, Microsoft OneDrive, Sync.com etc. As long as you share that location with the other users, they can find the backups on that same location and restore them.

#### When you have Multiple Databases

If you are maintaining multiple databases on your computer, with the **Database ⇒ Switch Databases** [menu option](#), the databases after the first one will have different file extensions that you supply (for example be named DONATION4.*whatever*, rather than your first database's name DONATION4.DB). The backups will be named accordingly, for example DONATION-YYYY-MM-DD.HH.MM.SS.*whatever*.GBK for regular backups, etc.

Before you can restore an additional database to a second computer for the first time, you have to set up a database with the correct file extension in **Database ⇒ Switch Databases**. After that setup, it will create the database, and then give you an option to start using it by restoring a backup. That can be done with a regular backup (Method 1 above) or email backup (Method 2 above), but not with an Internet backup (Method 3 above). You can switch to Internet backups after your first restore, if you wish.

#### Note on Software Licensing

When you have DONATION installed on two computers for the same organization, you can apply the same License Key to both of them. See the section on [Software Licensing and Evaluation](#) for more details on License Keys. Alternatively, you can copy the file dons1.txt from the [Data Directory](#) of the first licensed computer to the Data Directory of the other computer - it contains your licensing information.

## 28.8 Use the Database on a USB Memory Key

It is possible to change the program's setup to use the database on a USB memory key. This would be most advantageous if you have the program installed on multiple computers, perhaps one at your home and one in your organization's office, and you want to bring the database with you as you move between those different computers. This is for users of the Standard or legacy [Lite](#) versions of DONATION, but not the [OnDemand Version](#) or [Local Network versions](#).

**There are a number of things that can go wrong when you use this method, and it is only suitable for users who are quite computer literate, and would be comfortable manually navigating to and editing the program's INI file if there was a problem.**

**This is not a method of making database backups!** Please see [Making Data Backups](#) for how to do that.

**This is also not a method for restoring database backups from another user!** Please see [Restoring Backups](#) and/or [Transfer your Data between Computers](#) if that is what you are doing.

There is no additional charge for multiple users with this setup.

You do need to be aware that the program may run somewhat slower with the database on a USB memory key than when the database is on your hard drive, in the normal setup.

This could also be done with an external hard drive, but for simplicity the rest of this help topic will just refer to it as a USB memory key. USB memory keys are also known as jump drives or memory sticks. Please note that the **only** places you can move the database to are ones that are physically attached to your computer, so a network drive is not an option - it just will not work at all.

Doing this is similar to the options described in the Help topic [Transfer your Data between Computers](#), but in this case, there is only one copy of the database. As such, there is no danger of different copies of the database being modified independently. (That would be bad, because changes made to multiple copies of a database cannot be merged). Other options for multiple users to share a database are listed in the Help topic [Multiple User Options](#).

**The [Cloud Storage Service](#) or [OnDemand Version](#) (two of the options under Multiple User Options) are usually better and safer options than this one, as long as you have consistently reliable high-speed Internet on all computers on which you will be installing DONATION.**

#### Detailed Instructions

If you are going to proceed with this option, you need to carefully perform the following slightly technical steps **on each computer running DONATION** (once) to make using the database on a USB memory key work:

1. Install the Standard version of DONATION normally, if it is not already installed. (This can also be done with the free [Lite version](#).)
2. If you already have data on this computer, make a backup of it before continuing, for safety.
3. Use the **Tools ⇒ Explore Data Directory** menu option to open a Computer, My Computer or Windows Explorer-type window showing the program's [Data Directory](#).
4. Without closing that window, switch back to DONATION, and exit DONATION.
5. Back in the window showing the Data Directory, find the file DONATION.INI (it may show up as just DONATION, saying that it is an INI file). Right-click on that file, and pick **Open** or **Edit** from the popup menu. That will open the file in the simple text editing program Notepad.
6. Find the line that starts "DatabaseDirectory=", and change it to read "DatabaseDirectory=E:", without the quotes. (This assumes that when you plug in a USB memory key on this computer, it comes up as the drive E:. If it comes up as some other



drive, change that line accordingly.)

7. Save that change with the **File -> Save** menu option in Notepad, then exit Notepad.
8. Only on the computer that has the most current version of the database, plug in your USB memory key. From the window showing the Data Directory, drill down into its subdirectory named Data. You should see a file there named DONATION4.DB, and at least one other file named DONATION4.metadata. Copy **all** files in that directory to the USB memory key, in its main directory, for example E:\.
9. Exit the Window showing the Data Directory.

Now when you run DONATION on any computer, being sure to have the USB memory key containing the database plugged in, it will be accessing the database from the USB memory key.

**Note:** If you prefer to put the database files in a subdirectory of your USB memory key, that is fine too. If for instance you wanted them to be on E:\Data, then you would set "DatabaseDirectory=E:\Data" in the DONATION.INI file.

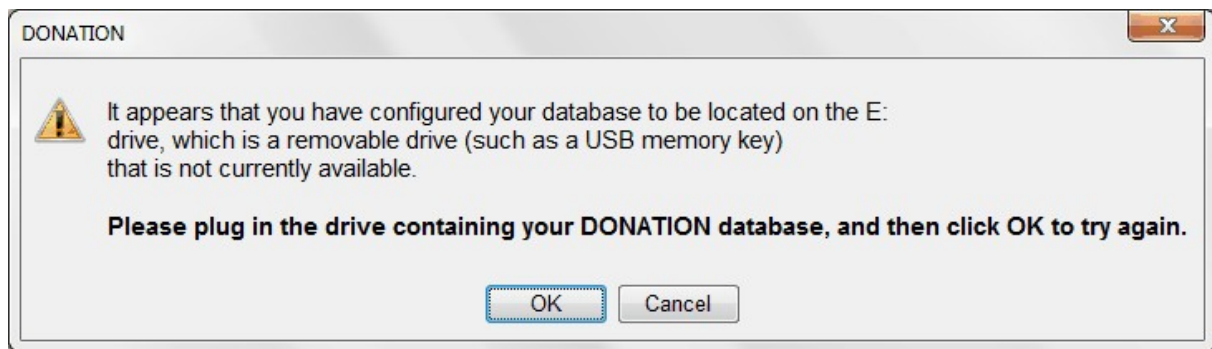
**Another Note:** You might think you could use the technique above, of changing the DatabaseDirectory setting in your DONATION.INI file, to move the database file(s) to somewhere else. However, unless it is to do what is described in this help topic (running the database from a USB memory key or external hard drive) we would strongly discourage you from doing that, as it just complicates support. Also, you absolutely **cannot** use this technique to move the database to a network drive, off of your computer - the Firebird database software that DONATION uses just will not open a database file that is on a drive that is not physically connected to your computer!

#### Potential Problems with this Setup

This should be obvious, but **never remove the USB memory key holding your database while you are running DONATION!** There is a real chance of your database being corrupted if you do that.

Sometimes on a computer, if you do not eject a USB memory key before removing it, and then plug in a different USB memory key (or the same one again), it comes up with the next available drive letter. So for instance if your USB memory key on a given computer usually comes up as E:, then you remove it, and re-insert it, it may come up as F:.

If that happens and you have DONATION set up to access the database on E:, and you then run DONATION, it will not find the database. You will see an error message such as:



You can click **OK** after plugging in the correct drive, and the program will try to connect to it again, or click **Cancel** if that is not possible (because the drive came up on the wrong drive letter) and the program will exit.

If you did have to cancel because the drive came up on the wrong drive letter, find the control in your Windows System Tray, which is at the bottom right of your Taskbar, or in the popup list of other tools, accessed from the System Tray, for "Safely Remove Hardware and Eject Media", or words to that effect. Click on it, which will bring up a list of drives that can be ejected. Click on the one (or ones) that need to be ejected. After that, it should say that the drive can be safely removed, so remove it. Once you have ejected whatever USB drives it says are there, you should be able to put the USB memory key back in, and have it show up as the normal expected drive letter, for example E:, and you should then be able to run DONATION successfully.

In some cases if you can't get the drive to come up as the expected letter, you may have to give up and re-edit the DONATION.INI file to change the DatabaseDirectory setting you set above. You find it in the [Data Directory](#) of the program, which you can navigate to directly in Computer, My Computer, or Windows Explorer. That directory where you will find the DONATION.INI file is C:\Users\Public\Documents\Cooperstock Software\Donation (the "Documents" part may show up as "Public Documents" when you are navigating to it – they are the same place)

Another issue with this setup is that if you contact us for support, and there is any chance a problem you are discussing with us might be related to the location of the database, you **must** mention that you are using this setup with the database living on a USB memory key.

#### Backups with this Setup

Normally a USB memory key is one of the most recommended places to backup your database to. However, when the database already lives on a USB memory key, you need to back it up somewhere else, either to the hard drive(s) of your computer(s), or to a different USB memory key, and/or use the options for [Email Backups](#) or [Internet Backups](#).

If you just backup to the same USB memory key, then if that key dies (which can happen) or is lost, you have nothing. (That's the same issue as if your database lives on your hard drive, in the normal setup, and you backup only to that hard drive. If that hard drive dies, you have nothing.) The program will actually warn you if you are trying to make backups to the same drive (whether the local hard drive or a removable drive like a USB memory key) on which the database file itself is located.

#### What Not to Do

Do not use the techniques for editing the DONATION.INI file described in this page to move the database to a 3rd-party cloud storage location such as Dropbox, Google Drive, Microsoft OneDrive, Sync.com etc. It is just a recipe for disaster, because there is no way to prevent multiple users from accessing it at the same time, and there is a real potential for damaging your database because of the way those services work.

There is nothing wrong with using a shared cloud storage location as a place to save your database **backups**, though, and you could use this with the techniques described in [Transfer your Data between Computers](#).

## 28.9 Determine what Version of DONATION I have

To determine what version of DONATION you are running, use the **Help** ⇒ **About DONATION** ... menu option. Among other things, the window that comes up tells you what release number you have, when the release was created, and whether it is the Standard (previously called Standalone, or Local Database), Free Lite, [Local Network Server](#), Local Network Client or OnDemand Version.

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