

What's new in FundRaiser Five?

There are three major areas of improvement in FundRaiser 5: Security , Convenience , and Information . We here at FundRaiser Software have greatly improved these three areas to  help make your FundRaiser experience more productive and much easier. **Let's take a look and see what is new:**



Security

Secure passwords- In FundRaiser 5 we have added a new feature to allow a user to have a secure password separate from the login password. Secure passwords are strong passwords that can be created by users to gain access to confidential data that needs additional protection primarily credit cards numbers and “Secure Spares” data. This and other security features in FundRaiser 5 were developed to exceed the current PCI compliance requirements.

Enter FundRaiser Secure Password

PCI Compliance regulations state that whenever someone views a credit card number that they must enter a password and that the password must change every 90 days. FundRaiser also requires this password for those using the Secure Spares feature.

A strong password must contain each of the following:

- an UPPER case letter
- a lower case letter
- a number
- a special character: ~!@#\$\$%^&*{<>/\[]?.,:;

and has a length of at least 8 characters.

It cannot be the same as the user's FundRaiser login password.

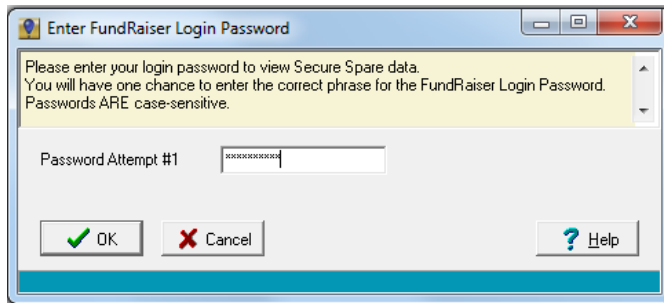
All boxes MUST be checked..

- UPPER
- lower
- number
- ~!@#\$\$%^&*{<>/\[]?.,:;
- Length of 8 or more

New Secure Password

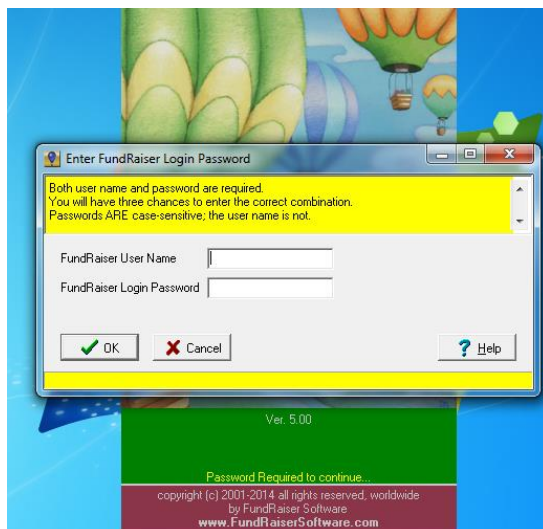
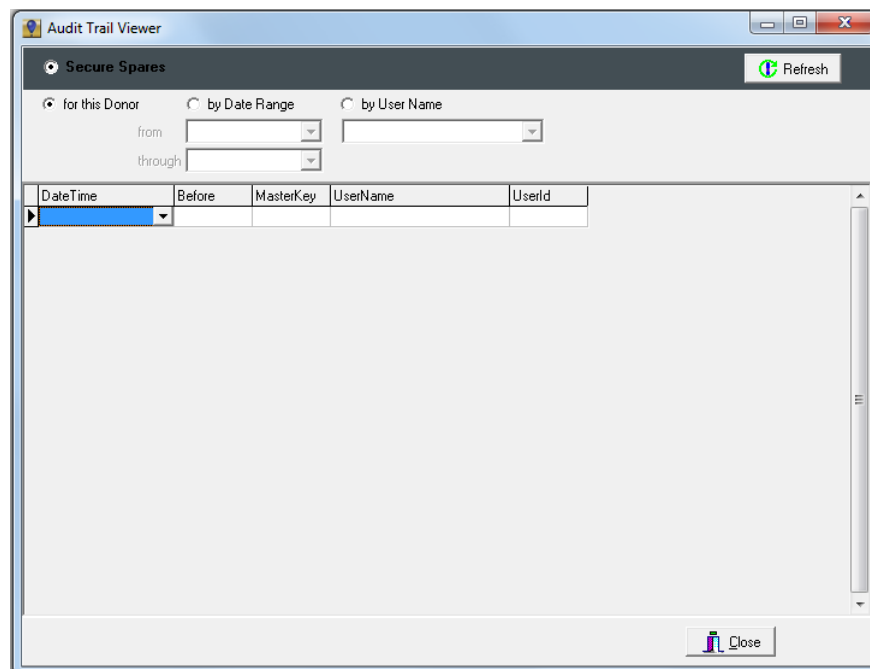
Confirm Password

Mask passwords while typing



Secure Spares- Secure Spares are just like the normal spare fields that you know and love; with one difference: Secure Spares can be hidden. Only those with the necessary security level can view Secure Spares. This allows you to record sensitive donor information that you would

normally not put into spare fields (e.g. medical records, confidential phone numbers, etc.). This feature also includes an audit trail that records each time a FundRaiser user views any donor's Secure Spares.



Option to require User Name during login-

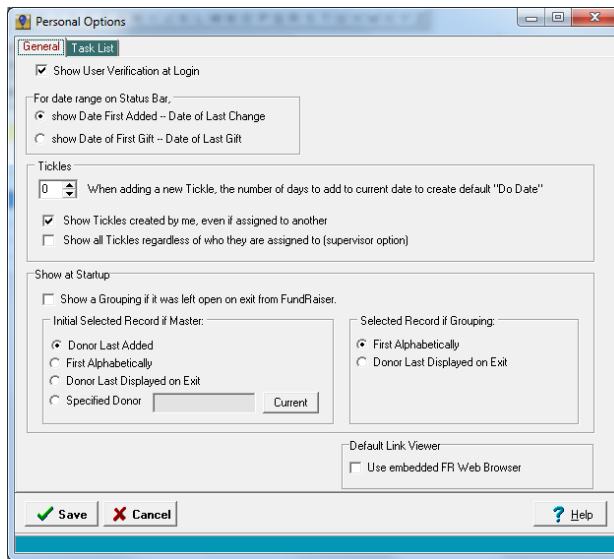
This option requires users to enter their username in addition to their password when logging into FundRaiser. This is a useful feature if you want to add a level of security to your data through “double credential verification”.



Convenience

Task list- The new Task List feature opens by default when you start FundRaiser. The Task List contains tickle reminders, letters that need to be printed in each of the sections of the Automated Correspondence menu (Gift Thank You's, Pledges, Memberships, etc.), and tasks in several other areas of the program. You can then go directly to those areas to complete your tasks..

Daily Review		Record Count	Last Reviewed
Tickles	<input type="button" value="Open"/>	<input type="text" value="0"/>	<input type="text"/>
Donor Portal Review Window	<input type="button" value="Open"/>	<input type="text" value="0"/>	<input type="text"/>
Donor Portal gifts for review	<input type="button" value="Open"/>	<input type="text" value="0"/>	<input type="text"/>
Star Donor Email Review	<input type="button" value="Open"/>	<input type="text" value="0"/>	<input type="text"/>
Recurring Gift Overnight Processing	<input type="button" value="Open"/>	<input type="text" value="0"/>	<input type="text"/>
Automated Correspondence		Record Count	Last Printed
Gift Thank You's	<input type="button" value="Open"/>	<input type="text" value="12"/>	<input type="text"/>
Pledges	<input type="button" value="Open"/>	<input type="text" value="3"/>	<input type="text"/>
Memberships	<input type="button" value="Open"/>	<input type="text" value="1"/>	<input type="text"/>
Tributes	<input type="button" value="Open"/>	<input type="text" value="0"/>	<input type="text"/>
Product Sales	<input type="button" value="Open"/>	<input type="text" value="0"/>	<input type="text"/>
Volunteers	<input type="button" value="Open"/>	<input type="text" value="0"/>	<input type="text"/>
QuickBooks Integration		Record Count	Last Posted
Ready to be added to Posting File	<input type="button" value="Open"/>	<input type="text" value="0"/>	<input type="text"/>
Posting errors to be reviewed	<input type="button" value="Open"/>	<input type="text" value="0"/>	<input type="text"/>
<input checked="" type="checkbox"/> Show All Tasks	<input type="button" value="Refresh"/>	<input type="button" value="Settings"/>	<input type="button" value="Close"/>

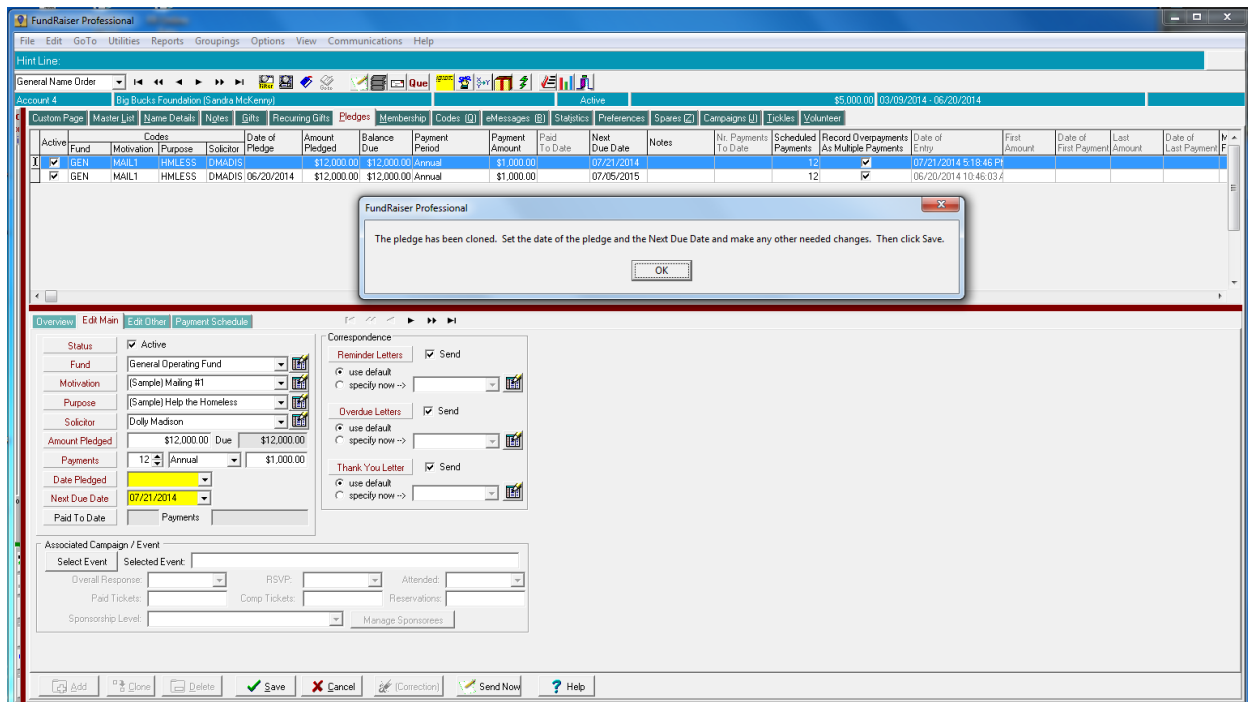


Start-up options- Personalize FundRaiser more with preferences from our new Personal Options. For example, you can now have FundRaiser startup with the custom page, allowing you start entering or looking up relevant information more quickly. You may also change your settings for the task list information.

Other personalization options include control over which donor record will be initially selected when you start up FundRaiser and whether the last Grouping you were working on opens automatically

are new features of FundRaiser 5.

Cloning donors, recurring gifts, and pledges- cloning is now available for donors, recurring gifts, and pledges. This can be handy when adding a new donor with a similar address, or renewing a recurring gift or pledge so you don't have to fill much of the same information again.



History tabs have moved. In FundRaiser 5, you may notice the lack of a Gift History tab or Pledge History tab. That's because the grid lists from those tabs are now on the same screen as the Edit tab. When adding gifts or pledges, you no longer have to switch between the two in order to see when the last gift or pledge was given.

Hey! I've moved to a new location.
I'm the **Gift History Listing** that used to be on a separate tab. I've moved to a new location that's so much more convenient.
I'm right here at the top of the Gifts tab now with the gifts' Edit tabs right below me.
So, now you can move around in the list quickly and easily and see the details immediately.
By the way, if you're looking for **Recurring Gifts**, they've moved to their own tab.
Just thought you'd want to know.

Date of Gift	Amount	Mode Code	Check Number	Gift Type	Motivation	Fund	Purpose	Solicitor	Misc	Period	Print In Next Bat
02/15/2014	\$250.00	CHECK		Later - promise to	PHONE1	GEN	BARBOOK				<input checked="" type="checkbox"/>
01/17/2014	\$5,000.00	CHECK		General Gift	MAIL1	GEN	EDUC				<input type="checkbox"/>

Edit Main | **Edit Other** | **Edit Notes** | **System**

Gift Date: 02/15/2014 | Amount: \$250.00 | Thank You Letter(s): TY1 | Print in Next Batch: | Has not been printed:

Check / Reference: | Credit Card: ACH | Receipt No.: 0 | Motivation Code: [Sample] Phonathon #1 | Fund Code: General Operating Fund | Purpose Code: [Sample] Books for Babies | Solicitor Code: | Deposit Information: Date of Deposit: 02/15/2014 | Batch Number: 0

Expanded suffix list-
Our expanded suffix list used during the import process now includes hundreds of new suffixes. Everything from CFE (Certified Fraud Examiner) to RRT-SDS (Registered Respiratory Therapist Sleep Disorder Specialist.) You can add your own as well.

These Suffixes are used primarily during the Import process to separate the suffix from the name that is being imported. FundRaiser comes with a default set of more than 250 common and not so common suffixes. If there are additional suffixes that your organization sees, you should add them to this list.

It is not necessary for you to know the corresponding Description. That is provided only for your convenience, but is not used by FundRaiser.

Sort Order: Abbreviation | Search for: |

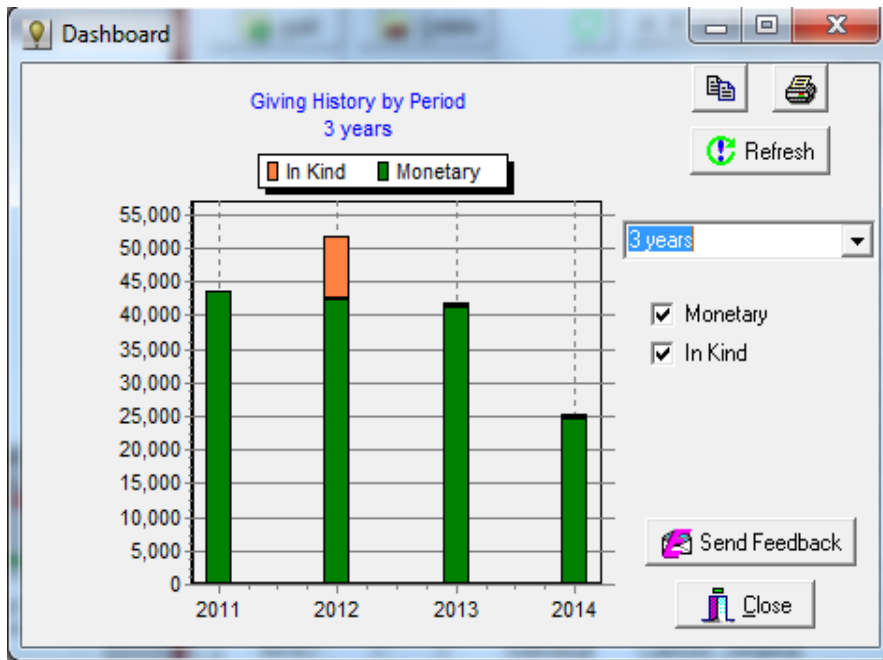
Abbreviation	Description	Date Added
8-VSB	Certified 8-VSB Specialist	01/01/2014
ABC	Accredited Business Communicator	01/01/2014
ABPP	American Board of Professional Psychology	01/01/2014
ABR	Accredited Buyer's Representative	01/01/2014
ACA	Associate of the Conference of Consulting Actuaries	01/01/2014
ACA	Advanced Certification Administrator	01/01/2014
ACAS	Associate of the Casualty Actuarial Society	01/01/2014
ACP	Advanced Certified Paralegal	01/01/2014
AEM	Associate Emergency Manager	01/01/2014
AIA	Member of the American Institute of Architects	01/01/2014
AICP	American Institute of Certified Planners	01/01/2014
ALA	Member of the Association of Licensed Architects	01/01/2014
ALC	Accredited Land Consultant	01/01/2014
ALP	Accredited Legal Professional	01/01/2014
AMD	Certified AM Directional Specialist	01/01/2014
AMS	Certified Broadcast Meteorologist	01/01/2014
APN	Advanced Practice Nurse	01/01/2014
APR	Accredited in Public Relations	01/01/2014
APRN	Advanced Practice Registered Nurse	01/01/2014
ASA	Associate of the Society of Actuaries	01/01/2014
ASLA	Member of the American Society of Landscape Architects	01/01/2014
ATC	Certified Athletic trainer	01/01/2014

Buttons: Add, Delete, Edit, Save, Cancel

Fields: Abbreviation: 8-VSB | Description: Certified 8-VSB Specialist



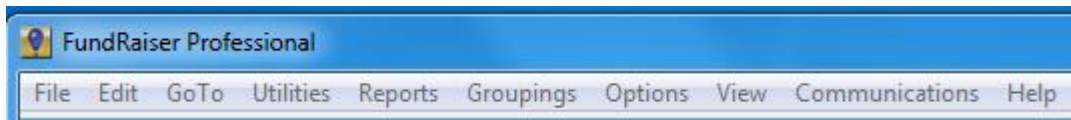
Information



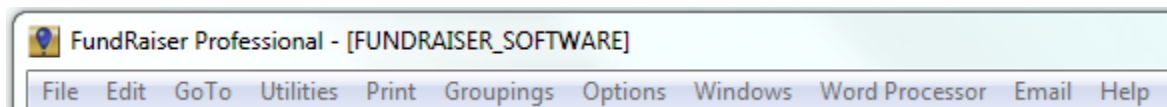
Dashboard- Need a quick graphical representation of giving history in real time? Clicking on the Dashboard button brings up a bar chart showing gifts totals for that week by default. It can also go back up to 7 years, enabling a quick analysis report for many common periods to be generated in seconds. You can even print the report or copy to another program.

New Menu layout- In an effort to make the FundRaiser Menu more intuitive. We have changed some of the choices, added new ones and moved others. We renamed the **Print** menu to **Reports**. The **Word Processor**, **Email**, **Automated Correspondence** and **Mass Mailings** are now under a new **Communications** Menu. The **Windows** menu has been renamed to **View**, because the Windows Operating System “Start” menu was a common misinterpretation. Additionally, miscellaneous processes have been added to the **Utilities** menu.

Ver 5.0 Menu



Ver 4.5 Menu



Pledges due field- In the Pledges Edit tab, to the right of Amount Pledged, you can now see the balance due on the pledge total, specifically Amount Pledged minus the Amount Paid To Date, leaving the Balance Due to complete the pledge.

Code length increased- The length of most codes has been increased from 6 characters to 9, allowing you to use more descriptive codes. For example when coding for a dinner fundraising event held in the Fall of 2014, you may have previously coded it as DNFA14, but now you can code it as DINFALL14.

Separated Recurring Gifts- FundRaiser 5 has moved Recurring Gift setups to a new dedicated tab. Instead of searching through all the gift history on the Gifts tab to find the “aqua blue” lines, the Recurring Gift setup records are on their own tab with edit controls for only the fields that are needed.