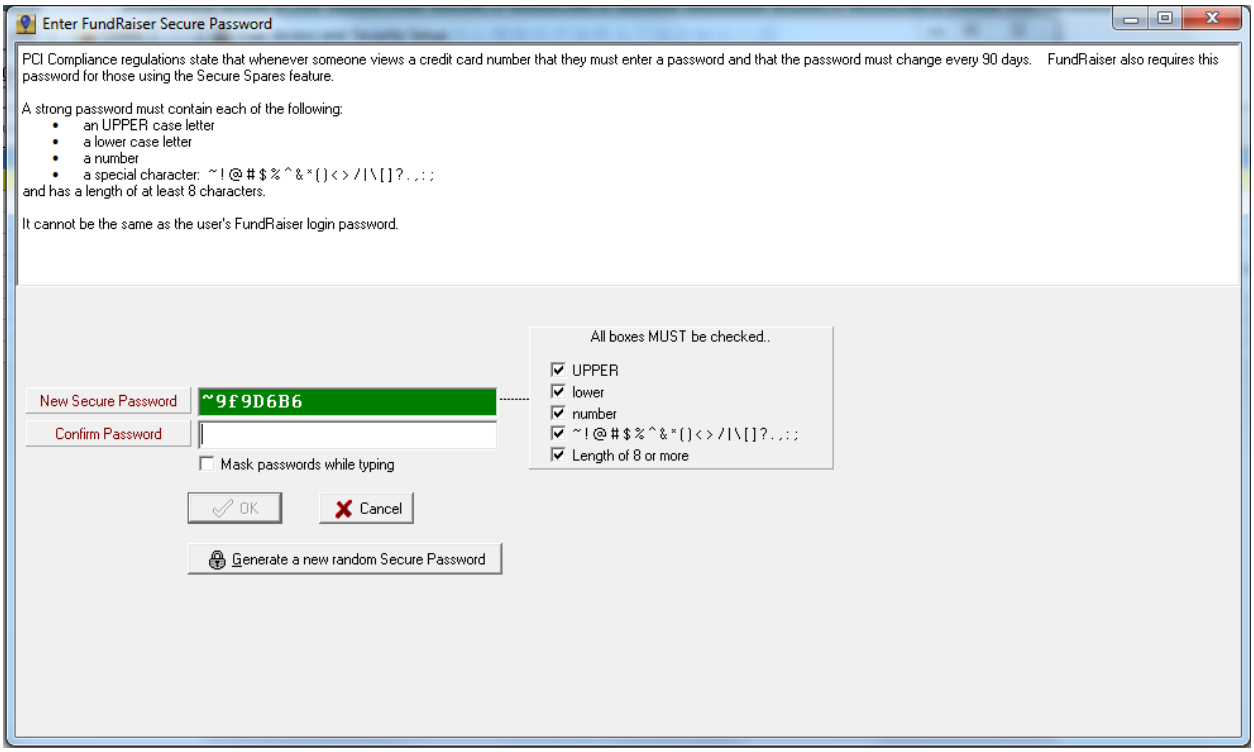
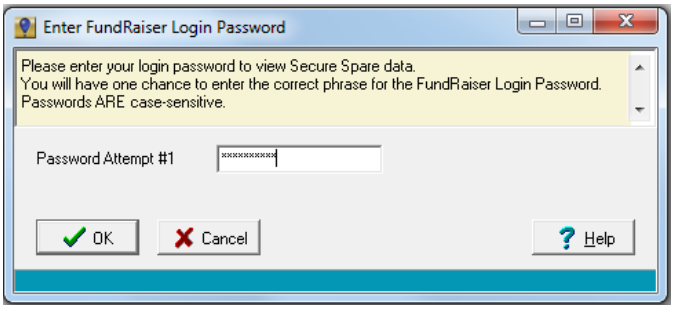
What's new in FundRaiser Five?

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:**

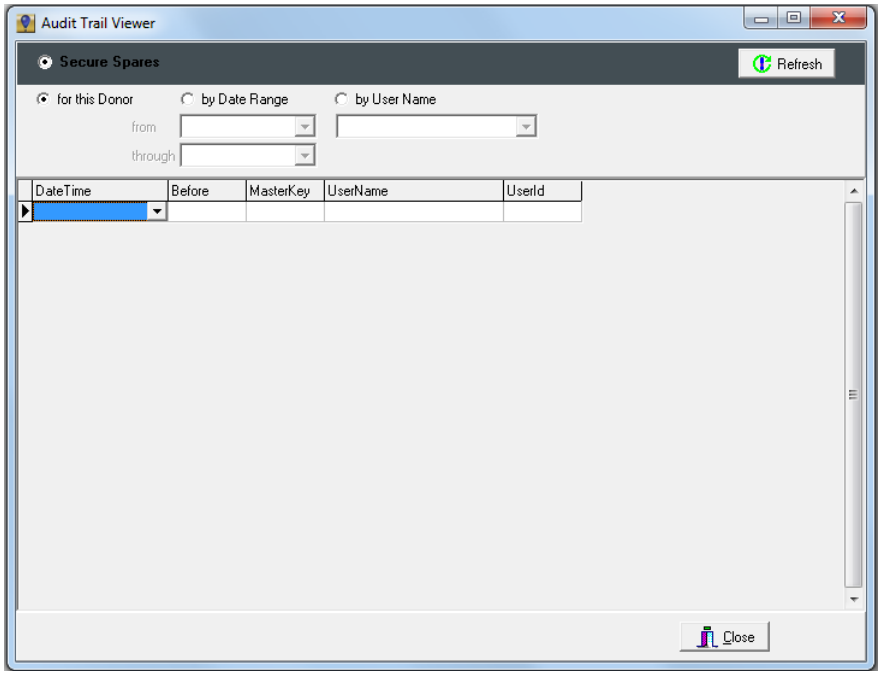
Security

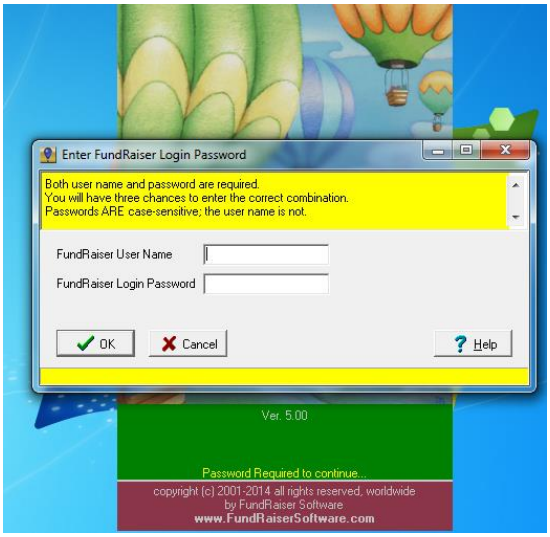
Secure passwords- In FundRaiser 5 we have added a new feature to allow a user to have a secure password separate from the login password. Secure passwords are strong passwords that can be created by users to gain access to confidential data that needs additional protection primarily credit cards numbers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





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.

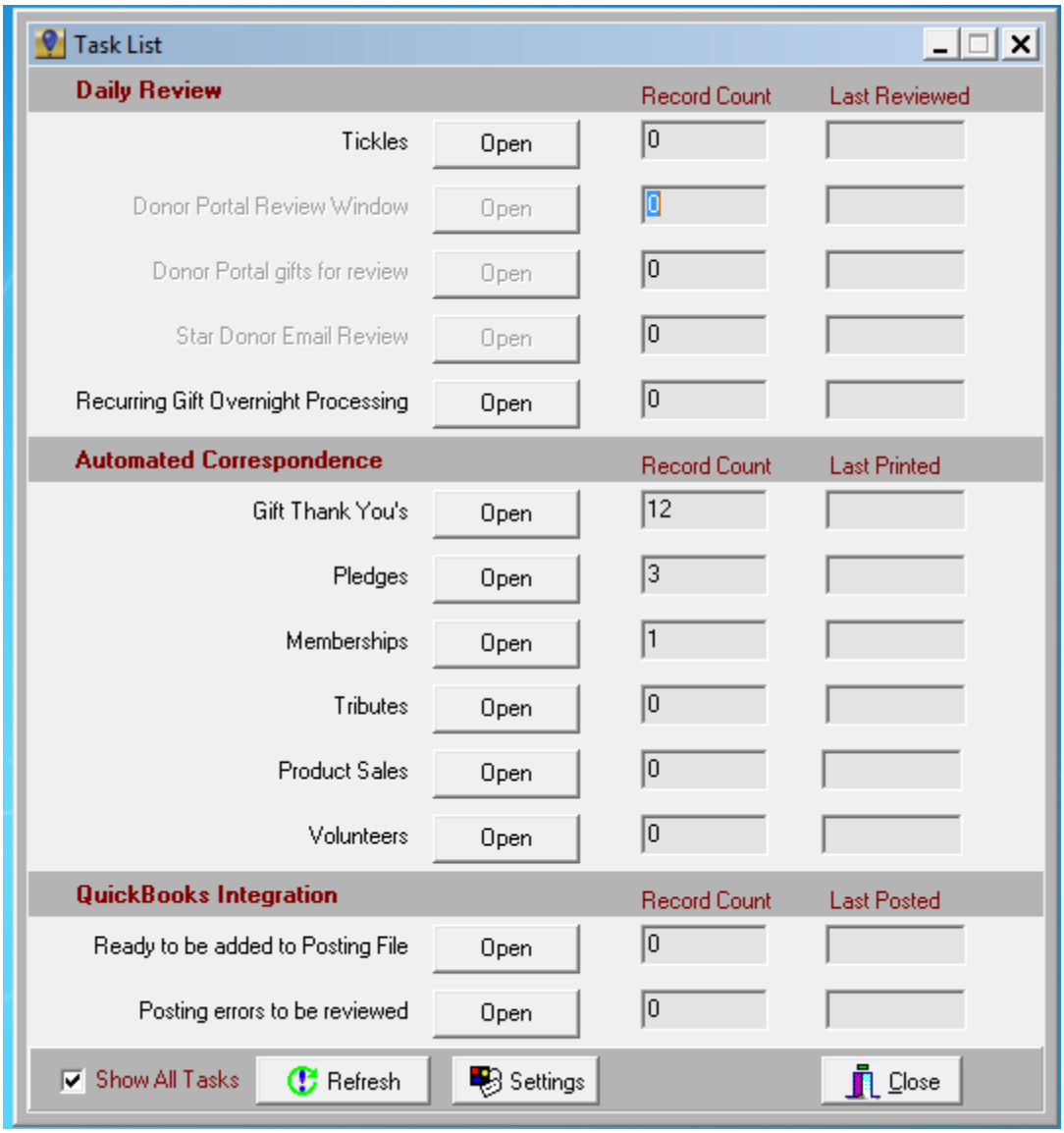


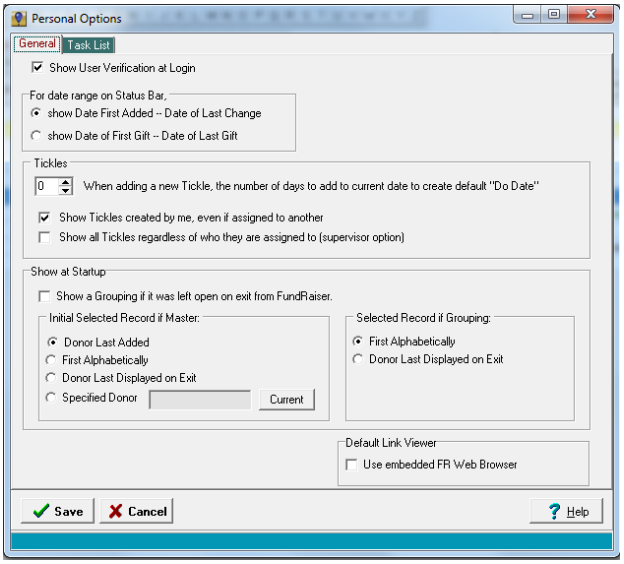


Option to require User Name during login- This option requires users to enter their username in addition to their password when logging into FundRaiser. This is a useful feature if you want to add a level of security to your data through "double credential verification".

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..

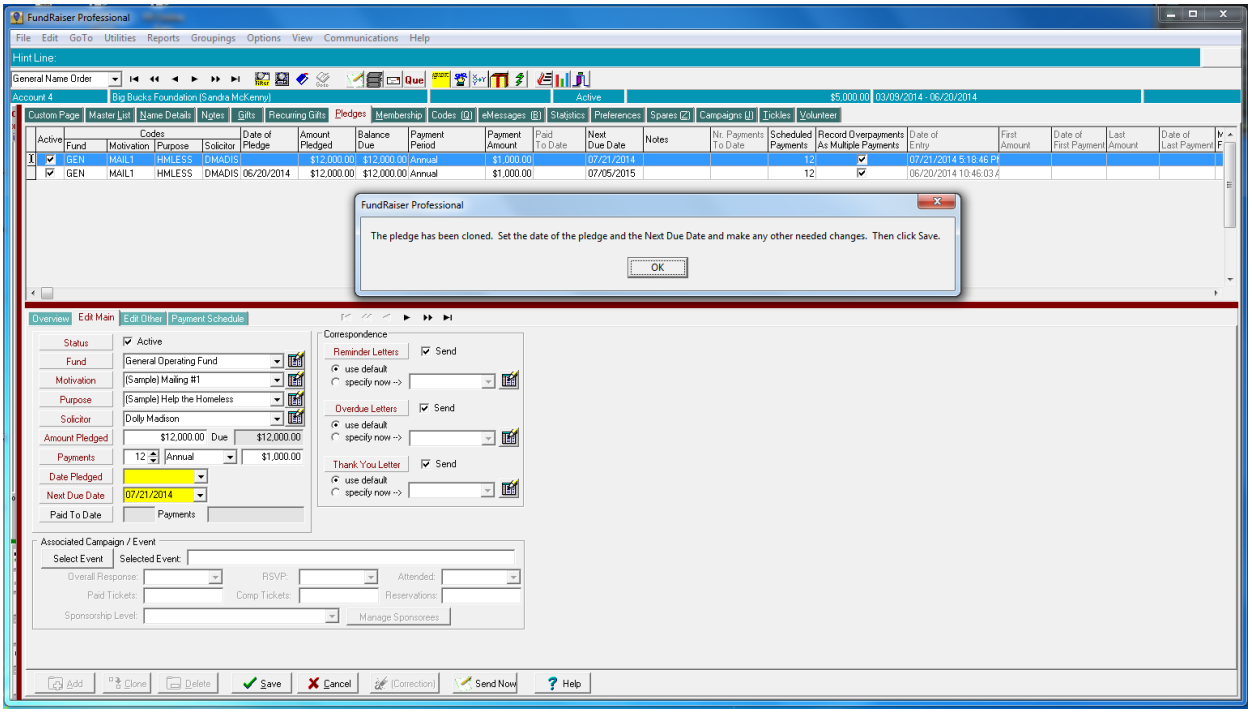




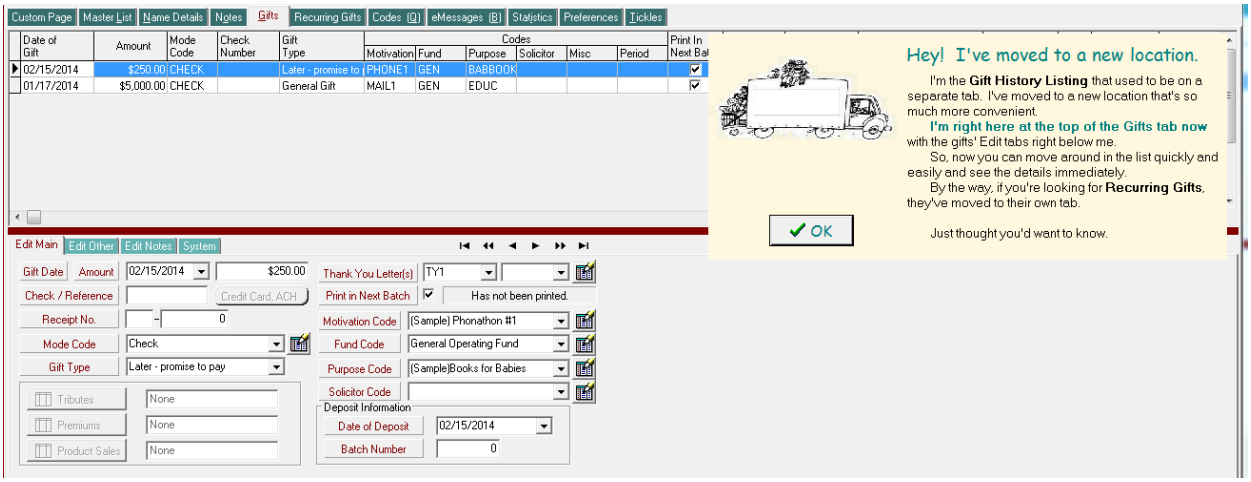
Start-up options- Personalize FundRaiser more with preferences from our new Personal Options. For example, you can now have FundRaiser startup with the custom page, allowing you start entering or looking up relevant information more quickly. You may also change your settings for the task list information.

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.

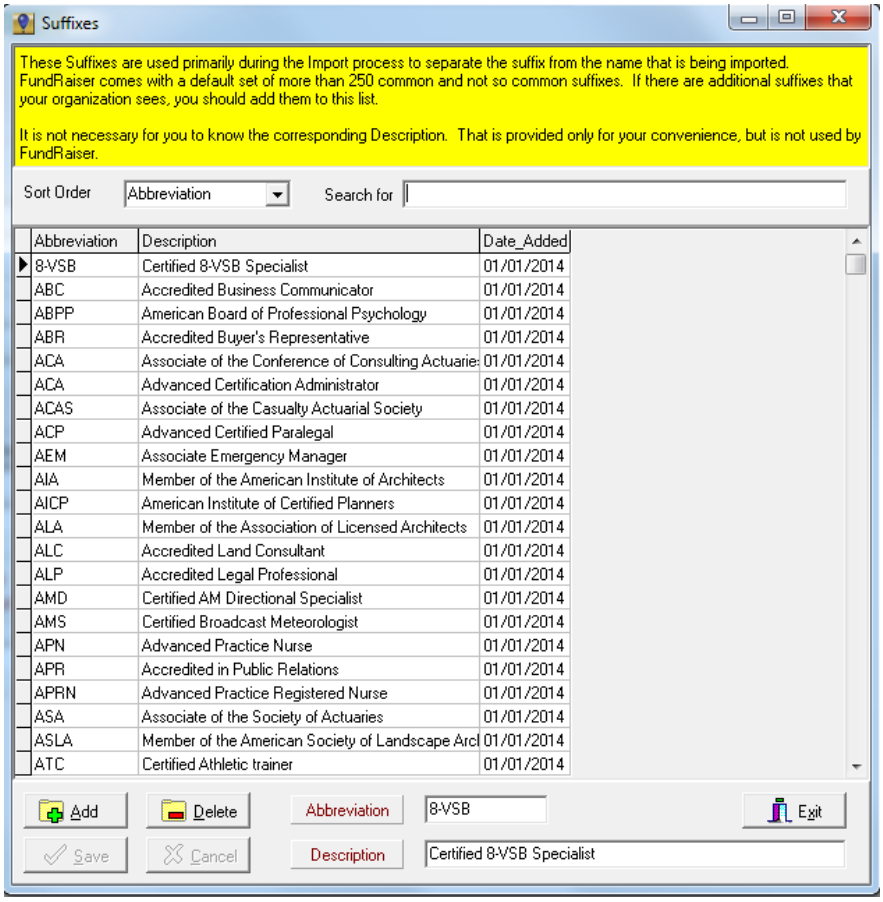
Cloning donors, recurring gifts, and pledges- cloning is now available for donors, recurring gifts, and pledges. This can be handy when adding a new donor with a similar address, or renewing a recurring gift or pledge so you don't have to fill much of the same information again.



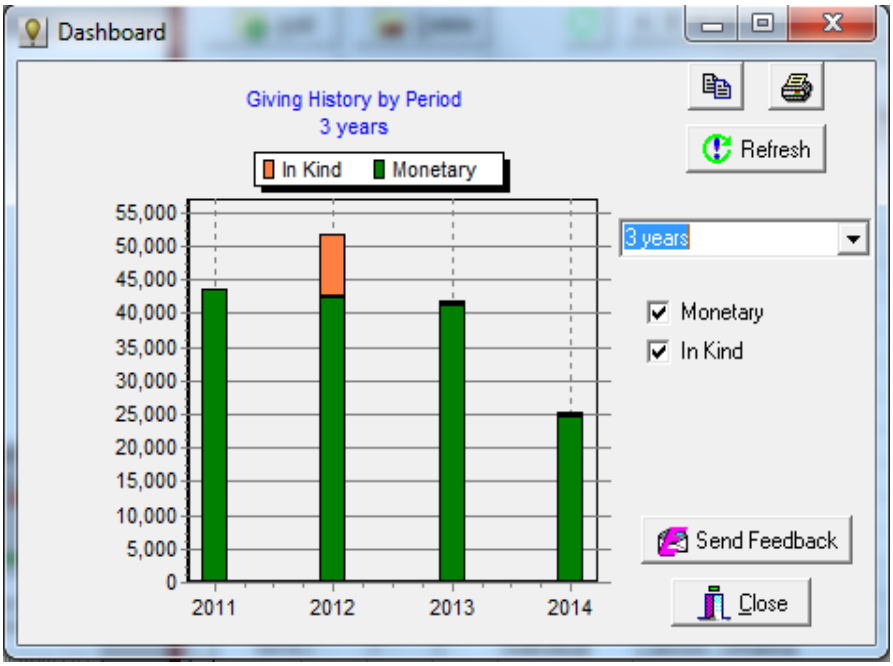
History tabs have moved. In FundRaiser 5, you may notice the lack of a Gift History tab or Pledge History tab. That's because the grid lists from those tabs are now on the same screen as the Edit tab. When adding gifts or pledges, you no longer have to switch between the two in order to see when the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



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.



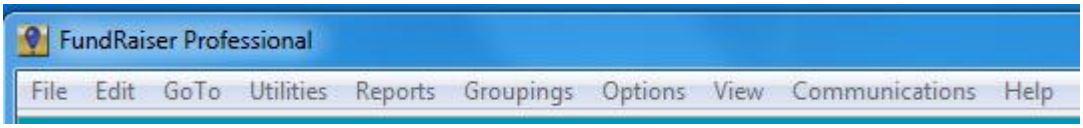
Information



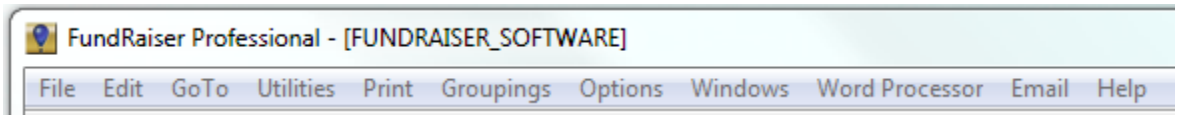
Dashboard- Need a quick graphical representation of giving history in real time? Clicking on the Dashboard button brings up a bar chart showing gifts totals for that week by default. It can also go back up to 7 years, enabling a quick analysis report for many common periods to be generated in seconds.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

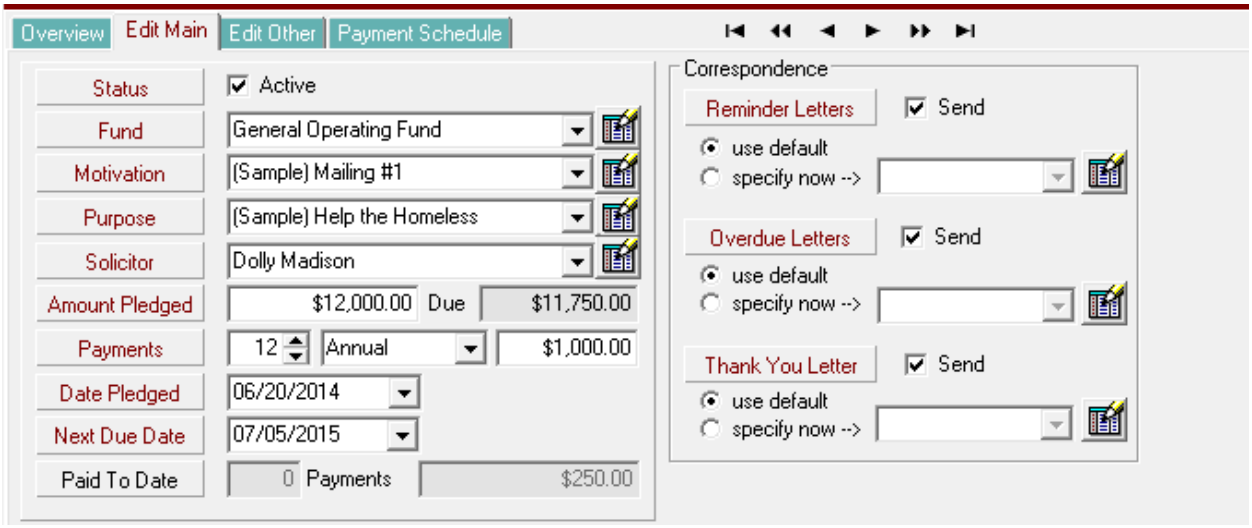
Ver 5.0 Menu

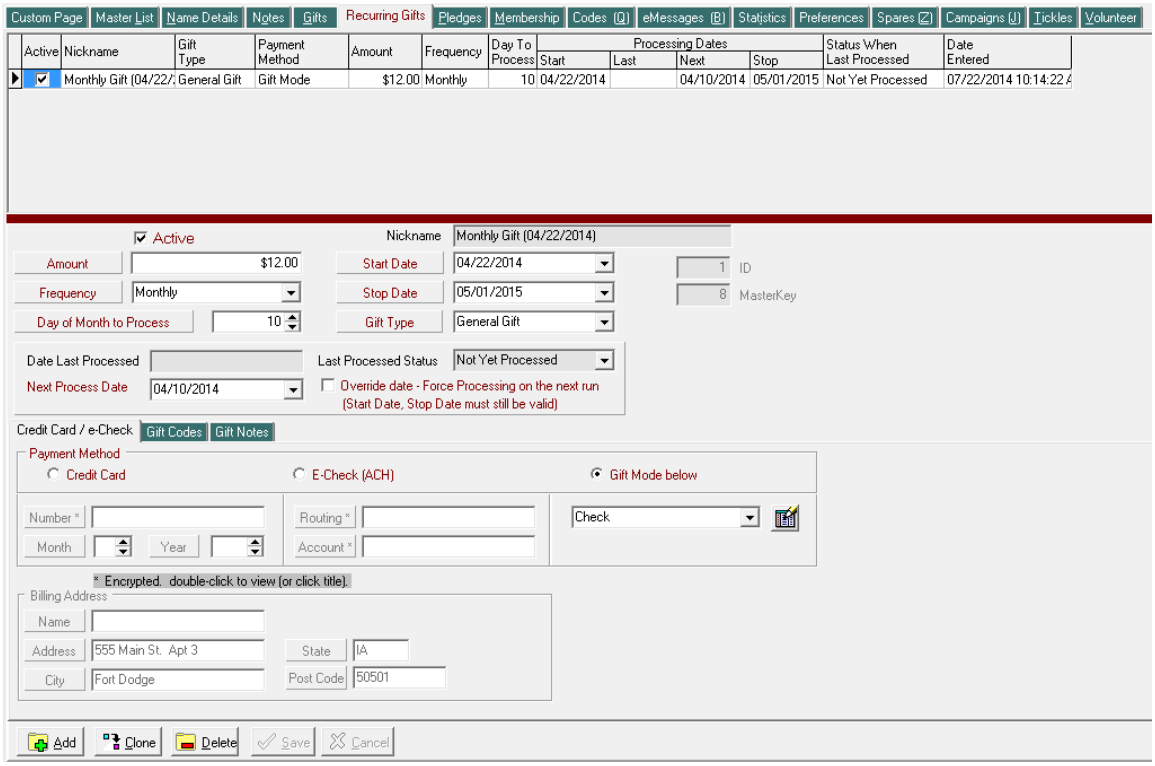


Ver 4.5 Menu



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.