C A S C A D E D A T A S O L U T I O N S

DONATION TRACKER INFORMATION

Our mission is to provide powerful, yet easy to use, Campaign Management software with excellent Support. When you purchase Donation Tracker, you will receive a full year of included Support and Maintenance from the date of installation. After the first year, Support may be renewed yearly by paying the Annual Support and Maintenance Fee.

PRICING

Donation Tracker*

Metro 7	$5,895
Metro 6 and 5	$6,495
Metro 4 and 3	$6,795
Metro 2 and larger	$6,995
Conversion**	$2,000

Optional Software Modules to Add-On*

Accounting Interface: Designed for QuickBooks®	$500
Data Import Routine: Includes (1) ImportDef.xml file	$500
Each Additional ImportDef.xml file	*+$100*
Automatic Credit Card Processing	$200
Multiple Database Module:	Click here for more info

When you purchase Donation Tracker you will receive:

- ✓ The Donation Tracker Software (with up to 5 concurrent users)
- ✓ Remote Program Installation & Training
- ✓ Unlimited Technical Support with our Support Team, for a full year
- ✓ Unlimited Additional Training Sessions for Staff as needed, for a full year
- ✓ All Product Updates *and* Upgrades Released, within the year

Annual Support and Maintenance Fees*(after the first year):

Metro 7	$1,375/yr
Metro 6 and 5	$1,400/yr
Metro 4 and 3	$1,425/yr
Metro 2 and larger	$1,600/yr
Accounting Interface	+$150/yr
Data Import Routine	+$250/yr
Automatic Credit Card Processing	*Included*
Multiple Database Module	Click here for more info

Prices are valid and honored through December 31, 2017
**Conversion fee is an estimate, please discuss your conversion in depth with us to receive an accurate fixed quote
QuickBooks® is a registered trademark and service mark of Intuit Inc. in the United States and other countries

When you purchase a year of Support and Maintenance you will receive:

- ✓ Unlimited Training Sessions, for all users
- ✓ Unlimited Technical Support with our Support Team, for all users
- ✓ All Product Updates and Upgrades Released, within that year
- ✓ Consultations of how to best use Donation Tracker for your Campaign

CONVERSION INFORMATION

We work with you to determine the best method for getting your existing campaign data into Donation Tracker. If a data conversion is the favored option, we typically estimate a $2,000 flat rate fee to convert your data, however, we require a conversion discussion to provide you with an accurate fixed quote. We have experience with conversions from many other software systems such as; *Andar, CamapignMax, CMS, IMS, RaisersEdge, Rainbow, TradeWinds, TopGiver, Excel,* and *Access*. We always like to run a "test" conversion before we perform the actual conversion to be sure there are no unexpected issues that we will need to deal with. We have found that our conversion process allows our customers to have their data in Donation Tracker in a short timeframe, eliminating downtime without your data, and also allowing you to get started on training sessions as soon as possible.

REPORTS

Donation Tracker Reports provide a great deal of flexibility and allows you to analyze your campaigns. The reports in Donation Tracker make it easy to find lapsed donors, quickly generate labels, send mass emails, generate solicitation letters, and create various listings. All reports can be exported into PDF, Excel, or Word.

TWO YEAR SUPPORT PLAN INFORMATION

We offer a Two Year Support Plan to help make acquiring Donation Tracker and our Annual Support and Maintenance more affordable. The Two Year Support Plan takes the purchase price of Donation Tracker plus the second year's Annual Support & Maintenance fee(s) and adds them together then divides them in half creating an amount to be paid in two installments over a two-year period. The first payment is due upon installation of Donation Tracker, and the second equal payment is deferred until one year after installation. Currently, assuming no conversion costs and no additional modules, here is an example of how the Two Year Support Plan would look for Donation Tracker:

- ❖ Two equal payments of $3,622.50
  Donation Tracker for a Metro 7 ($5,895*) + Second Year's Support ($1,375*) = $7,270 total/2 = $3,635

*Prices are valid and honored through December 17, 2017

CLOUD HOSTING

There are advantages and disadvantages to having Donation Tracker in a cloud environment. Of course the primary advantage is having "anywhere access" to Donation Tracker. Other advantages include cost savings on hardware, administration, and other in-house IT related management and expenses.

However, there are some disadvantages to consider as well. For example, if your internet goes down, you cannot access your data. If your hosting provider goes down for any reason, you cannot access your data. Lastly, due to the limitations of some hosted environments, some of our product's integration pieces may not be available, such as the Credit Card Processing Module for X-Charge and the Accounting Interface for QuickBooks®.

There are many providers that offer cloud hosting services on a subscription basis such as, Data Management Concepts (formerly UWITC), who currently hosts our products in their cloud environment.   Keep in mind that the hosting provider you choose must be capable of hosting applications that run Microsoft products.

Frequently Asked Questions:

Q: Do you recommend one cloud hosting provider over another?
A: No, we recommend that you review each cloud hosting provider, look at their reviews, and choose the one that works best for your organization. Again, the provider you select must be capable of hosting applications that run Microsoft products.

Q: Do we have to have our Donation Tracker hosted in a cloud environment to continue to use the software?
A: No, Donation Tracker are desktop applications designed to be installed locally in your Microsoft environment.

Q: Will having our Donation Tracker hosted in the cloud change our Annual Support and Maintenance fee(s)?
A: No. If you choose to have your software hosted in a cloud environment, your Annual Support and Maintenance fee(s) will not change.

Q: Will we have to stay current on our Annual Support to use Donation Tracker in a hosted environment?
A: If you are using Data Management Concepts (formerly UWITC) as your hosting provider, then yes, you will need to be covered under Annual Support to be eligible to use the most current version of Donation Tracker that is hosted in Data Management Concept's cloud environment.

Q: Who does the training and support if we host our Donation Tracker in a cloud environment?
A: Cascade Data Solutions. As always, you will call our 800 number to continue to receive training, support, and any other help you need with Donation Tracker.

Q: If we have the Accounting Interface designed for QuickBooks®, will this work in a hosted environment?
A: If QuickBooks® is hosted in the cloud as well, yes, the Accounting Interface should work but you will need to confirm with the hosting provider.

Q: If we have the Automatic Credit Card Processing Module used with X-Charge, will this work in a hosted environment?
A: No. Unfortunately, X-Charge does not currently work in the hosted environment.

Q: If we use Constant Contact® within Donation Tracker, will this work in a hosted environment?
A: Yes. All functionality that exists within Donation Tracker for managing lists in Constant Contact® will work in a hosted environment

Q: If we have Donation Tracker's Import module, will this work in a hosted environment?
A: Yes.

Q: What if we don't like the hosted environment, and would rather use Donation Tracker locally on our own hardware?
A: You are responsible for any remaining agreement with the hosting provider you choose. However, as part of your Annual Support and Maintenance, we can always re-install Donation Tracker and all of your data back onto your local environment.

Q: Will I still be able to back up my database to my thumb drive?
A: Yes.

OPTIONAL SOFTWARE MODULES

Donation Tracker's optional software modules are available to be purchased separately from the main application and have their own support costs. We separate these modules from Donation Tracker because in many cases they are not needed by all of our clients and it allows us to make Donation Tracker more affordable. Below is a detailed description of each Optional Software Module that we currently offer for Tracker.

ACCOUNTING INTERFACE

This optional module allows transactions keyed into Donation Tracker to be imported directly into QuickBooks. This includes pledges, payments, adjustments, deletions, and write-offs. The information imported into QuickBooks will be posted as journal entries associated with a customer named Donation Tracker. The Accounting Interface only integrates with QuickBooks® desktop versions. The Accounting Interface must be installed on a PC running Donation Tracker. The Accounting Interface must be installed on the same PC as QuickBooks® or must have access to the QuickBooks® company file over a network.

AUTOMATIC CREDIT CARD PROCESSING

We have teamed up with X-Charge to provide you with an affordable option to process credit card payments. All it takes is paying a onetime fee for the setup of the Credit Card Processing Module for Donation Tracker and setting up a merchant account through X-Charge. We chose X-Charge because their credit card processing fees were the lowest of those we looked at and they also allowed us to integrate their system as closely as possible with Donation Tracker. This integration makes processing credit cards easy and very secure. X-Charge meets the Payment Card Industry Data Security Standard or PCI DSS. Only an alias of the donor's card number and the last 4 digits are stored in the Donation Tracker database. This makes your donor's credit card information as secure as possible. For more information about PCI DSS certification and credit card security please visit: https://www.pcisecuritystandards.org/.

 X-Charge also supports a full range of credit card processing options. If you need to process credit cards outside of Donation Tracker, X-Charge will work for that too, and very likely save you money over your current credit card processing provider. X-Charge has very competitive rates when compared to other credit card processors. You will set up a merchant account directly though X-Charge and your transaction fee will be based on your type of business and volume of transactions. To activate X-Charge within our software we charge a onetime setup fee of $200. Purchasing the credit card integration will not add to your yearly support costs.

You may contact OpenEdge by phone, (800) 338-6614, or via email startnow@openedgepay.com, to discuss setting up a merchant account or for more information.

MULTIPLE DATABASE OPTION

If your office is currently, or thinking about, acting as a back office for pledge processing for more than one United Way office, then we have the ideal solution for you. Donation Tracker offers you the ability to record and maintain all campaign data for multiple United Way locations. Each location operates autonomously from the other, which gives you total control over how each location's campaign is configured and recorded. Switching between locations is as easy as selecting a menu option and picking the desired location from a pre-defined list. Because you are actually working out of multiple Donation Tracker databases, you can configure each location's specific settings without impacting any of the other locations.   It's just like having two or more copies of Donation Tracker, one for each location. Please call us for a more in-depth discussion of how the multiple database version of Donation Tracker could be used in your office.

Frequently Asked Questions:
Q: What is the purchase price of the multiple database option?
A: The purchase price of each multiple database is half of the current purchase price of Donation Tracker for the metro size whose data will be stored in the multiple database.

Q: What is the annual support and maintenance fee for the multiple database option?

A: After the first year, the annual support and maintenance fee for each multiple database is simply the current annual support and maintenance costs for the metro size of the United Way whose data is being processed in the multiple database.

Q: What does the annual support and maintenance fee for the multiple database option include?

A: The annual support and maintenance fee for each multiple database includes our standard support including; unlimited technical support, updates and upgrades, report modifications, custom report creation, and training.

Q: What if the United Way whose data is being processed in the multiple database decides to manage their own data and use Donation Tracker independently?

A: They can choose to purchase Donation Tracker for their office with the amount already paid for the multiple database credited towards the purchase price of Donation Tracker.

DATA IMPORT ROUTINE

If your office currently receives employee pledges from employers in the form of a spreadsheet that you end up having to re-key into Donation Tracker then we have the ideal solution for you. Donation Tracker now has an optional Data Import Program which offers you the ability to import employee giving by defining an import format and using our new data import program to bring in the giving information without the need of having to re-key every single pledge. You are provided with the ability to match up and review each employee donor and their giving information prior to actually bringing the information into Donation Tracker. This helps prevent creating duplicate accounts and allows you to keep your contact information current.

ANNUAL SUPPORT & MAINTENANCE

In order to communicate to you our commitment to the Support and Maintenance of **Donation Tracker** we have put the following information together for you. The first year of Support & Maintenance *is included in the initial purchase price* of Donation Tracker. There are no additional fee(s) for any of the services listed above; they are all included as a part of the Annual Support & Maintenance. In you are budget planning, please remember that your Annual Support & Maintenance will be due one year after you purchase and install Donation Tracker.

What's included in Annual Support & Maintenance?

- ✓ Unlimited, Toll-Free Technical Support with our Support Team
- ✓ Product Updates and Upgrades
- ✓ Report Modifications
- ✓ Additional Training of Staff (as needed)
- ✓ Consultation of how to best use Donation Tracker for your Campaign

Unlimited, Toll Free Technical Support with our Support Team:

We encourage you to call our toll free number 800-280-2090 as often as you need us. Support is what we are here for and what you are paying for so please use it.

Product Updates and Upgrades:

Update and upgrades are distributed via our web site. The frequency of *updates* is kept to a minimum. The frequency of *upgrades* is approximately once a year. As our Support Team identifies a problem the user is having as an issue that has been resolved by an *update*, we work with that individual user to determine the best method for them to obtain the update. We include the updates and new features in a planned *upgrade,* which is mailed out to each site approximately once a year. The instructions are for the users to call our Support Team to schedule an installation and to get training on the new features.

Additional Training of Staff (as needed):

Most of the above support items should be assumed of any good support & maintenance package, but one of the most overlooked items covered under support is additional training. Additional training is not only for existing staff but new staff as well. With the high turnover in the United Way system, being able to have new staff call for complete training has proven to be very valuable.

Consultation:
We welcome your calls asking traditional Support questions, but also encourage you to call us asking how to use Donation Tracker to better manage all your campaign tracking needs

SYSTEM REQUIREMENTS

- ✓ Workstations: Microsoft Windows Vista, 7, 8, 10 (Windows XP, Windows10S not supported)
- ✓ Server: Windows Server 2003 (PostgreSQL installed only) or Windows Server 2008-2012

The following is required for both Workstations and Server:
- ✓ Minimum Free Hard Drive Space: 5GB (+20GB recommended)
- ✓ Minimum Display Resolution: 1024 x 768 (1920 x 1080 recommended)
- ✓ 4GB RAM Minimum (6-8GB+ recommended for Windows Professional)
- ✓ Intel Pentium 4 Class Processor or Higher Recommended (All current Intel & AMD Processors will run Donation Tracker)
- ✓ Internet Access (Cable/DSL or other high speed internet connection recommended)
- ✓ Donation Tracker is not compatible with 64 bit version of Outlook

Donation Tracker uses PostgreSQL as the database engine. PostgreSQL is extremely scalable and can be installed and configured to run on a stand-alone computer, in a "peer-to-peer" setting, or on a file server running Windows Server 2008 or higher. Resource requirements can vary widely depending on the number of concurrent users and the volume of data being processed at any given time. Having 8GB of RAM and employing multi core processors will adequately handle the majority of situations.

There is no need for a specific type of network or file server to run Donation Tracker, but if you are going to have a server setup it needs to be on Windows Server 2008 or higher. Donation Tracker will work on a standalone computer, a "peer to peer" network, Windows Server or in a Remote Desktop Services environment.

If your nonprofit chooses to install Donation Tracker in a Remote Desktop Services, or the older Terminal Services environment, be sure to choose a qualified and certified network professional. We will work in conjunction with whomever you choose to install Donation Tracker.

Our system requirements are based on the assumption that nonprofits replace their computer hardware and operating systems approximately every three years. Of course, as processing speed and RAM are increased, software performance will also improve. We recommend using business-class computers, which generally offer higher levels of performance than home models when running business applications.

Remote access to your PCs for support, training, and installation will significantly improve our ability to support Donation Tracker. If remote access is not available we will do our best to provide quality support, however, some issues may take longer to resolve. Also some situations may require the transfer of your donor database to our server for testing. All donor information is held securely and used solely for testing and issue resolution.

Dear United Way Office,

Donation Tracker was originally created as the result of a neighboring United Way office being frustrated with their existing Campaign Management Software. They convinced us of the need for United Way specific software with specific features unique to how United Way does business, and even more importantly, its need to be strongly supported.

From the very beginning, the mission of Donation Tracker has been to provide an inexpensive and easy to use tool to manage a United Way Campaign. In addition, for the support costs to remain fixed and not rise from year to year.

It's like a circle. The support reflects the software, and the software reflects the support. If the product is hard to use, doesn't have the needed features, or is not a solid product, then the support costs rise. Because one of our goals is to never raise the cost of our support we must strive to make the software easier to use by changing the areas of the system that get the most attention from our support calls. By forever changing the software not to just include new features, but to reduce the need for the users to call for support, we are creating a win - win situation. The users are less frustrated, they spend less time calling in for support and we are then able to keep our support cost down but at the same time we are creating a better product that then in turn gives the users more value for their original investment.

At Cascade Data Solutions, we have a great sense of urgency to continue this circle of software and support. Because of the low upfront cost for Donation Tracker, we are only able to make our profit by retaining our customers for the long term. And how do we retain our customers? By the circle of software and support. Good software helps to create good support. But just as important, good support and maintenance creates good software.

In some respects, what you are buying from us is a software package that comes with a built in relationship. The relationship starts when you first make contact with us, and grows each day once the purchase has been made and continues through installation and on into the future. We all know a relationship is based on commitment. This commitment helps you to get the most out of your upfront investment, as well as the yearly support and maintenances cost. This commitment also helps us keep you as a customer, but more importantly as a satisfied customer with no reason to go anywhere else. I invite you to join the Donation Tracker circle and thank you for considering Donation Tracker.

Sincerely,
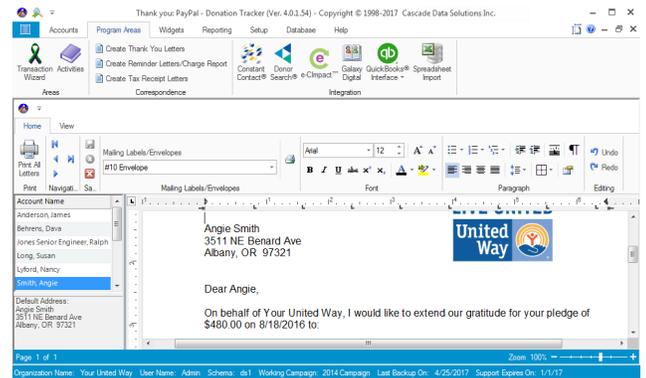
Don Bayne | President
Cascade Data Solutions, Inc.

Donation Tracker
Product Fact Sheet

Designed specifically for United Way offices, Donation Tracker is the most cost effective Campaign Management Software/CRM tool available. With our CRM features, including our integration with Constant Contact and our Accounting Interface designed for QuickBooks®, Donation Tracker has all the tools you will need to successfully manage your campaigns, year after year.

General

- Customer Relationship Management (CRM) features
  - Activity (call reports, journals, tasks, correspondence) recording
  - Loyal contributor tracking
  - Measurement reports
  - Integration with Constant Contact
- User defined Campaign Map used to segment your donor base
  - Three levels deep
  - Assign contacts at each level
  - Assign goals for each level
- Ability to differentiate between agency types
- Ability to limit system users to specific program functions
- Unlimited number of campaign years
- Flexible search options
- Comprehensive audit trail of transactions
- Accounting Interface designed for use with QuickBooks®

Reminders/Bills & Payments

- Full amount or periodic billing by campaign
- Flexible search options to help identify proper accounts when posting payments
- Ability to re-print reminders on demand
- Ability to record payments included with campaign envelopes or as received
- Single payment liability for payroll deduction

Campaign Envelope/Pledge Entry

- Ability to record pledges, payments, and designations in one simple process
- Internal system checks to help ensure accuracy
- Tracks gifts raised from special events
- Multiple billing frequency options with donor specific start date
- On-screen balancing of campaign envelopes with donor cards
- Campaign envelopes tracked by batch numbers and/or envelope numbers
- Ability to add/update accounts during pledge entry
- Designed to help eliminate duplication of accounts during pledge entry
- Accommodates "Employee Fund" pledges where specific donor information is unknown
- Ability to add designated agencies during pledge entry
- Accommodates multiple designations per pledge
- Accommodates multiple pledge types
- User defined payment types
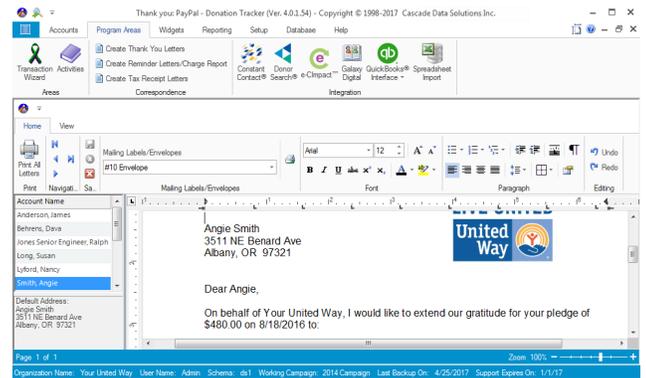- Easy and auditable adjustments

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  - • Integration with Constant Contact
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