



## DONATION DIRECTOR

Our mission is to provide a powerful, yet easy to use, donor management software solution at an affordable price for all nonprofit organizations. When you purchase Donation Director you will receive 60 days of included Support from the date of installation. After the first 60 days, continued support is optional and may be renewed annually by paying our Annual Support and Maintenance Fee subject to terms and conditions.

### PRICING INFORMATION\*

#### Donation Director

Single User License	\$1599
Each Additional User License	\$299
Two Year Support Plan	<a href="#">Click for more information</a>

#### Optional Modules

Accounting Interface ( <i>Designed for QuickBooks®</i> )**	\$399
Custom Import	\$299
Standard Import	<a href="#">Included with Donation Director</a>
Automatic Credit Card Processing	\$99
Single User Multiple Database	\$799

#### When you purchase Donation Director you will receive:

- ✓ The Donation Director Software
- ✓ Remote Program Installation
- ✓ (4) Two-Hour Training Sessions
- ✓ Unlimited Technical Support with our Support Team, for 60 days
- ✓ Unlimited Additional Training Sessions for Staff as needed, for 60 days
- ✓ All Product Updates *and* Upgrades Released, within the 60 days

#### Annual Support and Maintenance Fees (after first 60 days)

Single User License	\$548.76/yr
Each Additional User License	+\$140.76/yr
Accounting Interface	+\$100/yr
Custom Import Routine	+\$75/yr
Automatic Credit Card Processing	<i>Included</i>
Single User Multiple Database	+\$299/yr

\*Prices are valid and honored through December 31, 2019

\*\*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

## CONVERSION INFORMATION

We have (3) options for you when you purchase Donation Director and wish to have your existing data converted and/or imported into Donation Director.

### ✓ **Standard Import**

Our Standard Import is included and integrated within Donation Director to allow you to easily import spreadsheets. You can utilize the Standard Import as often as needed. Basically, it's an easy way for you to add accounts to your database from spreadsheets you import. For more information, see our [Standard Import Spreadsheet Guidelines & Rules](#).

### ✓ **Custom Import**

If you wish to import more data than our Standard Import allows, you can purchase our Custom Import. Our Custom Import allows you to not only import account information, but transactional data as well. Our Custom Import is designed to import donor account information as well as donor transactions from sources outside of Donation Director. The Custom Import allows for careful review of the information being imported, minimizing the creation of duplicate records. Our Custom Import is a great way to get started with using Donation Director by importing your existing data from other spreadsheets.

### ✓ **Paid Conversion**

We offer a Paid Conversion which is typically used when you don't have the time or expertise to use our Standard or Custom Import. This process involves working with you to get your existing data, and then we import that data into Donation Director for you. The starting fee for our Paid Conversion is \$1,500.00; however, this fee is sometimes greater depending on the complexity of the import. Contact us to get an estimate of how much your conversion will cost. This process still requires some effort on your part while we work with your data. We transfer the data back to you several times during this process. This is to resolve issues and to make sure your data is being imported correctly.

## TRAINING INFORMATION

Once you purchase Donation Director, we will schedule your installation and begin training sessions. The first (4) initial training sessions are divided into two-hour sessions, spanning over 1 ½-2 weeks of time. Training sessions are performed using a remote internet connection and each session introduces the user to a new portion of Donation Director. Sessions are scheduled a few days apart to allow the user time for "homework" to apply concepts learned in the previous session and to prepare for the following session. We find that if the user is actively participating, on time, and actively utilizes information learned between trainings, (4) two-hour sessions should be sufficient to get you started with Donation Director.



However, we do not limit the number of trainings and encourage you to schedule more training sessions as needed. Also, more than one staff member may attend trainings.

## INITIAL TRAINING SCHEDULE

### Training Session One:

- ✓ Installation of Donation Director
- ✓ Application Setup
  - Organizational Setup
  - User Preferences/Setups
- ✓ Accounts
  - Searching
  - Add/Edit Accounts
  - View Gifts/Giving Summary
- ✓ Program Setup
  - Lookup Lists
  - Appeal/Campaign
  - Letter Templates
  - Membership
- ✓ Discuss Import and/or Conversion Needs

### Training Session Two:

- ✓ Giving
  - Batch and Gift Entry
- ✓ Correspondence
- ✓ Advanced Searching

### Training Session Three:

- ✓ Reporting
- ✓ Widgets
- ✓ Implement Your Database

### Training Session Four:

- ✓ Start Working with Your Data
- ✓ Q&A
- ✓ Schedule Additional Training If Needed

If you are covered under our Annual Support and Maintenance (or are within the first 60 days) training sessions come at no additional cost to you. We highly recommend scheduling as many training sessions as you need to feel comfortable working within Donation Director. Part of our Annual Support and Maintenance includes unlimited training sessions, so please take advantage of it if you feel it will be beneficial to you. Likewise, if you have any staff turnover, or new users working with Donation Director, you can call us directly at (800) 280-2090 to set up new user training.



## TWO YEAR SUPPORT PLAN INFORMATION

We offer a Two-Year Support Plan to help make acquiring Donation Director, and our Annual Support and Maintenance, even more affordable. If you know you want to extend your Support past the expiration of the first 60 days included with the purchase of Donation Director, purchasing our Two-Year Support Plan, in conjunction with Donation Director, is a great way to get started at a lower initial cost. There are no fees or finance charges associated with this promotion if paid in full by the yearly due dates, otherwise, deferred interest charges may occur.

Our Two-Year Support Plan takes the purchase price of Donation Director and two years of Annual Support and Maintenance fee and adds them together. This amount is then divided in half, to be paid in two installments. The first payment is due before installation of Donation Director and the second equal payment is due one year from the expiration date of your first 60 days of free Support included with the purchase of our software. After this two-year period, if you have valued our Support and want to continue with it, our current Annual Support and Maintenance fee for the next year would apply. Additional modules must be purchased separately, but you are able to bundle them into the Two-Year Support Plan.

Currently, assuming no conversion costs and no additional modules, here is how the Two-Year Support Plan would look with Donation Director's Single User License:

### ❖ Two equal payments of \$1,348.26

- ✓ Donation Director's Single User License (\$1599) +
- ✓ First Year's Support (548.76) +
- ✓ Second Year's Support (\$548.76) =
- ✓ \$2,696.52 total

This includes the purchase of Donation Director, 60 days of included Support, and two additional years of Support and Maintenance. Our Two-Year Support Plan is a great way to ensure you will be covered under our Support and Maintenance for 26 full months.

### ❖ Our Annual Support and Maintenance includes the following:

- ✓ Unlimited training sessions for current or new users
- ✓ Unlimited technical phone Support
  - (Monday through Friday from 7am to 3:30pm Pacific Time)
- ✓ All software updates and/or upgrades released during that year

*\*Prices good through December 31, 2019. Payment is required before we begin conversion or schedule installation and training. The first 60 days of included support begins on the day Donation Director is installed. Second payment installment of Donation Director is due one year after the expiration of the first 60 days of support if purchasing with our Two-Year Support Plan.*



## OPTIONAL SOFTWARE MODULE INFORMATION

Donation Director'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 Director because, in many cases, they are not needed by all of our clients and it allows us to make Donation Director even more affordable. Below is a detailed description of each Optional Software Module that we currently offer for Donation Director.

### ACCOUNTING INTERFACE DESIGNED FOR QUICKBOOKS®

Simplicity is the key feature of the Accounting Interface module. All transactions that are keyed into Donation Director can potentially be imported into QuickBooks®. This includes new transactions, adjustments, and write-offs. What you will see in QuickBooks® are journal entries that are associated with a customer named Donation Director.

After purchasing the Accounting Interface module, a Cascade Data Solutions Support Specialist will assist you in the initial setup. This process involves connecting the Accounting Interface to your QuickBooks®, matching up the Donation Director chart of accounts with your QuickBooks® chart of accounts, assigning your QuickBooks® chart of accounts to your appeal categories and/or designations and if necessary, assigning classes.

The Accounting Interface module allows for a high degree of flexibility. Importing is as simple as specifying a transaction date range, a batch date range or a batch number. You can review the transactions that are pulled up prior to actually importing them into QuickBooks®. You can also make simple changes to which chart of account item or class the transaction is to be assigned.

After the fact, you can stay in sync by running the Post Import Report. This report compares your import log with the transaction information in Donation Director and QuickBooks®. Any exceptions would indicate that something was changed in one location but not the other.

❖ **Requirements for the Accounting Interface module are as follows:**

- ✓ The [system requirements](#) are the same as Donation Director's.
- ✓ The Accounting Interface must be installed on a PC running Donation Director.
- ✓ The Accounting Interface may be installed on the same PC as QuickBooks® or must have access to the QuickBooks® company file over a network.
- ✓ For best performance, have QuickBooks® running with the correct company file open.

\*QuickBooks is a registered trademark and service mark of Intuit Inc. in the United States and other countries



## CUSTOM IMPORT

Our Custom Import module allows you to not only import account information, but transactional data as well. Our Custom Import is designed to import donor account information as well as donor transactions from sources outside of Donation Director. The Custom Import allows for careful review of the information being imported, minimizing the creation of duplicate records.

## AUTOMATIC CREDIT CARD PROCESSING

We have teamed up with [X-Charge](#) to provide our clients with an affordable option to process credit card donations. All it takes is purchasing the optional Automatic Credit Card Processing module for Donation Director and setting up a merchant account through X-Charge. This integration makes processing credit cards easy and very secure.

In addition to simply keying in credit card donations and processing them on the spot, you can also set up a pledge from a donor to automatically bill their credit card on their payment billing schedule. This keeps you from having to manage mailing out reminders when payments are due (or past due) or from having to manually charge a credit card using a card processing machine. Also, you limit your liability as there is no reason to keep credit cards numbers on file. The Automatic Credit Card Processing module can keep card numbers stored for you on the remote X-Charge servers. 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 Director 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 Director, X-Charge will work for that too, and very likely save you money over your current credit card processing provider.

## SINGLE USER MULTIPLE DATABASE

Our Single User Multiple Database module allows for more than one nonprofit's donors to be stored in Donation Director. Each nonprofit's records are completely separated from the others and each are protected with individual user login IDs and passwords. Two or more nonprofits could conceivably share a single Donation Director installation using this module.

## CLOUD HOSTING

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. There are advantages and disadvantages to having Donation Director in a cloud environment. Of course, the primary advantage is having “anywhere access” to Donation Director. 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 Director hosted in a cloud environment to continue to use the software?*

**A: No, Donation Director are desktop applications designed to be installed locally in your Microsoft environment.**

*Q: Will having our Donation Director 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 Director 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 Director that is hosted in Data Management Concept's cloud environment.**

*Q: Who does the training and support if we host our Donation Director 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 Director.**



*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 Director, will this work in a hosted environment?*

**A: Yes. All functionality that exists within Donation Director for managing lists in Constant Contact® will work in a hosted environment**

*Q: If we have Donation Director'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 Director 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 Director 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.**





## SYSTEM REQUIREMENTS

Donation Director uses PostgreSQL as the database engine. PostgreSQL is extremely scalable and can be installed and configured to run on a standalone computer, in a “peer to peer” network, on a Windows Server or in a Remote Desktop Services type of environment.

The following are the requirements necessary for your organization to run our products in your environment. Please review both pages of this document to ensure your organization’s system meets the requirements necessary to run our products prior to installation or program updates or upgrades.

### Workstation Requirement:

- ✓ Microsoft Windows 7, 8, or 10 (**Windows XP or 10S is not supported**)

### Server Requirement:

- ✓ Microsoft Windows Server 2008 or newer (**PostgreSQL installed only**)

### Workstations and Server Requirements:

- ✓ **Minimum Free Hard Drive Space:** 5GB (+20GB recommended)
- ✓ **Minimum Display Resolution:** 1024 x 768 (1920 x 1080 recommended)
- ✓ **Minimum RAM:** 4GB (6-8GB+ recommended for Windows Professional)
- ✓ **Minimum Processor:** Intel Pentium 4 Class Processor or higher (all current Intel & AMD Processors will run Donation Director)
- ✓ **Internet Access:** Cable/DSL or other high-speed internet connection
- ✓ **Email:** Our products are **not compatible** with Microsoft Outlook 64bit
- ✓ **Review:** Page 2 for more detailed information about workstation and server requirements

### Accounting Interface Requirements:

- ✓ Accounting Interface **only** integrates with QuickBooks® 2005 or newer desktop versions (**we do not integrate with QuickBooks® online versions**)
- ✓ Accounting Interface must be installed on a workstation also running Donation Director
- ✓ Accounting Interface must be installed on the same workstation as QuickBooks® or must have access to the QuickBooks® company file over a network
- ✓ For best performance, have QuickBooks® running with the correct company file open

### Security and Permission Requirements:

- ✓ Review our [Security and Permissions Policy](#).



## Additional Important System Requirement Information:

Our system requirements are based on the assumption that your organization replaces 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 such as our products. Our products will run on both *Microsoft Windows Home* and *Professional Editions*, however, due to limitations within *Microsoft Windows Home Edition*, this version cannot be used if you operate in a server environment and need to connect to a Domain.

We don't recommend a specific type of network or file server to run Donation Director, but if you are going to have a server setup, we do require it to be on Windows Server 2008 or newer. Remember that Donation Director will also work on a standalone computer, in a "peer to peer" network, on a Windows Server or in a Remote Desktop Services type of environment.

If your organization chooses to install Donation Director in a [Remote Desktop Services](#), or the older Terminal Services environment, be sure to choose a qualified and certified network professional. We are happy to work in conjunction with whomever you choose to install Donation Director.

Remote access to your PCs for support, training, and installation will significantly improve our ability to support Donation Director. If remote access is not available we will do our best to provide quality support, however, keep in mind that some issues may take longer to resolve. Also, some situations may require the transfer of your organization's donor database to our server for troubleshooting purposes. All donor information is held securely at our location and used solely for troubleshooting and issue resolution.

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.

If you have any questions or concerns about any of this information, we welcome you to contact us at 1-800-28090 to discuss and answer any of your questions.



## STANDARD IMPORT GUIDELINES & RULES

Our Standard Import is included and integrated within Donation Director to allow you to easily import spreadsheets. You can utilize the Standard Import as often as needed. Basically, it's an easy way for you to add accounts to your database from spreadsheets you import.

### Standard Import Spreadsheet Rules:

- ✓ The column names must be keyed into the spreadsheet correctly as shown below
- ✓ Unused columns may be removed from the spreadsheet
- ✓ When importing individuals, a first and last name is required
- ✓ When importing businesses, a business name is required
- ✓ For businesses, the first, middle and last name fields are ignored
- ✓ Once an initial import has been performed, the import routine will use the Account Import ID (if supplied) to search for a previously imported account with the same ID and update their information rather than create a duplicate account. If no Account Import ID was supplied the import routine will build an import ID using columns from the spreadsheet. **These columns include:** *Business Name + Account Code + First Name + Middle Name + Last Name + Street 1 + Street 2 + Street 3 + City + State + Postal Code + Phone Number + Email Address*

Column Name (Row 1)	Data Type	Notes
Account Import ID	Text (25)	Not required but helpful for matching up accounts
Account Type	Text (15)	Required if importing both Businesses and Individuals
Account Code	Text (25)	User defined
Business Name	Text (100)	Required for Businesses only
Title	Text (40)	Mr., Mr. & Mrs., Ms, etc
First Name	Text (50)	
Middle Name	Text (40)	
Last Name	Text (50)	
Maiden Name	Text (40)	
Suffix	Text (40)	Jr., Sr. , III, etc
Gender	Text (6)	Male or Female or Blank
DOB	Date	Formatted as MM/DD/YYYY
Source	Text (40)	Gets matched up to an existing DD3 list item
Employer	Text (40)	
Occupation	Text (40)	
Institution Attended	Text (40)	Gets matched up to an existing DD3 list item
Location / Campus	Text (40)	Gets matched up to an existing DD3 list item
Starting Date	Date	Formatted as MM/DD/YYYY
Ending Date	Date	Formatted as MM/DD/YYYY
Graduation Date	Date	Formatted as MM/DD/YYYY
Class Of	Number	Must be a four digit number – 2000



Degree Earned	Text (40)	Gets matched up to an existing DD3 list item
Mail To Name – Formal	Text (100)	
Salutation – Forma	Text (100)	
Mail To Name – Informal	Text (100)	
Salutation – Informal	Text (100)	
Mail To Name – Special	Text (100)	
Salutation – Special	Text (100)	
Address – Type	Text (40)	Required if entering an address
Address – Street 1	Text (100)	
Address – Street 2	Text (100)	
Address – Street 3	Text (100)	
Address – City	Text (75)	
Address – State	Text (50)	
Address – Postal Code	Text (25)	
Address – Country	Text (40)	
Address – Notes	Text (250)	
Phone 1 – Type	Text (40)	Required if entering a phone number
Phone 1 – Number	Text (40)	
Phone 1 – Notes	Text (250)	
Phone 2 – Type	Text (40)	Required if entering a second phone number
Phone 2 – Number	Text (40)	
Phone 2 – Notes	Text (250)	
Phone 3 – Type	Text (40)	Required if entering a third phone number
Phone 3 – Number	Text (40)	
Phone 3 – Notes	Text (250)	
Email 1 – Type	Text (40)	Required if entering an email address
Email 1 – Address	Text (75)	Must be a proper email address
Email 1 – Notes	Text (250)	
Email 2 – Type	Text (40)	Required if entering a second email address
Email 2 – Address	Text (75)	Must be a proper email address
Email 2 – Notes	Text (250)	
Attribute 1	Text (40)	Gets matched up to an existing DD3 list item
Attribute 2	Text (40)	Gets matched up to an existing DD3 list item
Attribute 3	Text (40)	Gets matched up to an existing DD3 list item
Attribute 4	Text (40)	Gets matched up to an existing DD3 list item
Attribute 5	Text (40)	Gets matched up to an existing DD3 list item
Demography 1 - GCS	Text (125)	Group, Category, Sub Category (separated by commas)
Demography 1 - Notes	Text (250)	
Demography 2 - GCS	Text (125)	Group, Category, Sub Category (separated by commas)
Demography 2 - Notes	Text (250)	
Demography 3 - GCS	Text (125)	Group, Category, Sub Category (separated by commas)
Demography 3 - Notes	Text (250)	



## ABOUT CASCADE DATA SOLUTIONS

We specialize in the creation of innovative, cost-effective solutions designed to meet the specific needs of the United Way and other Nonprofits.

In 1998 we designed a campaign management software package called Donation Tracker. Donation Tracker was originally created as the result of the Benton County United Way office in Corvallis, Oregon 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. In 1999, we took Donation Tracker to four other beta sites before selling it nationwide. Donation Tracker has been widely accepted and has been sold to over 475 United Way offices in the United States and Canada.

Donation Director followed Donation Tracker in 2005. Because of frequent requests from United Way affiliated agencies to purchase Donation Tracker, Cascade Data Solutions decided to follow this same model for creating specific donor management / fundraising software for small to medium sized nonprofit organizations. Donation Director meets the needs of smaller nonprofits by offering a powerful set of donor and fundraising management tools without burying them under needless levels of complexity and irrelevant features. The cost of our software along with our annual support program is designed to allow nonprofits to budget properly and guarantee that they always have the necessary support available to them.

## SOME THINGS TO THINK ABOUT...

Choosing the correct donor management software package is a decision that can have a significant impact on the future of a nonprofit organization and should be carefully researched. We provide a live online demonstration that is available to every nonprofit interested in Donation Director. If you haven't had the opportunity yet to sit through our demonstration, please take the time to do so.

We want all of our partners to be as successful as possible and will do all we can to make sure our software facilitates that success. You can obtain additional information about Donation Director via our website: [www.cascadedds.com](http://www.cascadedds.com).

If you have any questions, or need any additional information, please don't hesitate to call us toll free at (800) 280-2090.

Sincerely,

A handwritten signature in black ink, appearing to read 'Don Bayne'.

Don Bayne | President  
Cascade Data Solutions, Inc.