



**Support. Service. Success.**

***Functionality List:  
How Patron Software Can Help***

# FUNCTIONALITY LIST

At Patron Software, we have made every effort to create a comprehensive program that is easy to learn, easy to use, filled with tools and capabilities that help you and your organization accomplish your daily and long-term goals.

Patron Software continues to evolve and expand its functionality. Check with us periodically to make sure you have the most complete and current list.

## **I. PRIVATE DONORS (Individuals)**

- Add unlimited names, addresses and other demographic information
- Indicate who referred donor to your organization
- Modify and delete donor records
- Add information about each family member (mobile phone #'s, email addresses, birth dates, employer or school, special interests, etc)
- Indicate if family member is a child
- Indicate contact preferences and special requests (e.g., do not call)
- Enter salutation for letters
- Track subscribers or members of your organization by start date and/or expiration date
- Indicate subscription or membership level
- Generate about-to-expire membership reports
- Write unlimited notes about each interaction with a donor
- Apply cash, in-kind and pledge transactions
- Merge donations made by spouses
- Assign representatives of your organization to a donor
- Create and manage mail and email lists
- Send email to one donor or to a group of donors
- Indicate current status of each donor and donor family member
- Assign up to 3 keywords (user-defined data fields) to each donor
- Maintain year-to-year historical records for each donor
- Generate dozens of reports
- Identify donors who contributed last year, but not this year
- Identify donors who contributed some years, but not this year
- Identify donors who participated in a previous event, but not the current event
- Query donor records
- Export donor records to MS Word (mail merge), MS Excel or to an ASCII tab-delimited text file
- Import names and addresses from MS Excel
- Audit donor household and household occupant records
- Track before and after changes to each record
- Restore deleted records
- Track the date donor record was added and by whom
- Track the date donor record was last updated and by whom

# FUNCTIONALITY LIST

## II. PUBLIC DONORS (Companies, Foundations, Nonprofit and For Profit Organizations, Institutions, Government Agencies)

- Add unlimited business names, addresses and other demographic information
- Indicate who referred the company or contact to your organization
- Indicate business type
- Indicate if business is part of a group (e.g., General Electric or a supermarket chain)
- Modify and delete company records
- Add unlimited contact names, phone numbers and email addresses
- Indicate area of responsibility for each contact
- Indicate contact preferences and special requests (e.g., do not send mail)
- Track subscribers or members of your organization by start date and/or expiration date
- Indicate subscription or membership level
- Generate about-to-expire membership reports
- Write unlimited notes about each interaction with company employees
- Apply cash, in-kind and pledge transactions
- Assign representatives of your organization to the company
- Create and manage mail and email lists
- Send email to one contact within a company or to a group of contacts
- Indicate current status
- Assign up to 3 keywords (user-defined data fields) to each company
- Maintain year-to-year historical records for each company
- Generate dozens of reports
- Identify companies that contributed last year, but not this year
- Identify companies that contributed some years, but not this year
- Identify companies that participated in a previous event, but not the current event
- Query company records
- Export company and company contact records to MS Word (mail merge), MS Excel or to an ASCII tab-delimited text file
- Import names and addresses from MS Excel
- Audit company and company contact records
- Track before and after changes to each record
- Restore deleted records
- Track the date company record was added and by whom
- Track the date company record was last updated and by whom

# FUNCTIONALITY LIST

## III. TRANSACTIONS (Cash Donations, Gifts and Services, Endowments, Pledges, etc.)

- Apply transactions to private and public donors
- Allocate gifts to separate campaigns or events
- Modify and delete transactions
- Enter split transactions
- Link split transactions with a reference number
- Designate gifts as matching, memorials, or anonymous
- Print thank you letter and/or receipt when the transaction is entered
- Customize salutation for thank you letter
- Link pledges and pledge payments with a reference number
- Indicate tax-deductible amount of a donation
- Indicate fair-market value of in-kind gifts
- Track transactions by type and payment method
- Enter notes regarding the transaction
- Produce reports for one or more donors
- Select a report format
- Sort report by name, date, amount, pledge amount, or fair-market value
- Produce reports for specific events and activities or programs and classes
- Produce goal comparison reports
- Produce pledge reports - pledges due, pledges paid
- Forecast income
- Query transactions by any field in the transaction data entry form
- Export transaction records to MS Word (mail merge), MS Excel or to an ASCII tab-delimited text file
- Track the date transaction record was added and by whom
- Track the date transaction record was last updated and by whom

## IV. EVENTS (Income-producing activities)

- Define each event or income-producing activity
- Assign a financial goal
- Generate goal comparison reports (how much the organization has earned and how much needs to be earned to attain its financial goal)
- Enter contact information for event coordinator(s)
- Enter ticket or item price and the tax-deductible amount of each ticket or item purchased
- Create a task or to-do list for each event
- Query the event task list by date, event or item
- Identify all donors – private and public – who participated in the event
- Track the number of hours each volunteer worked on the event
- Export event transaction records or task records to MS Word (mail merge), MS Excel or to an ASCII tab-delimited text file

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## V. VOLUNTEERS

- Add detailed demographic information for each volunteer – name, address, gender, marital status, etc
- Maintain emergency numbers and medical information
- Indicate volunteer status
- Indicate who referred the volunteer to your organization
- Profile volunteer availability (e.g., days of the week, preferred time of day)
- Enter times when the volunteer is not available (e.g., summer)
- Indicate volunteer's preferred service area(s)
- Enter volunteer's interests
- Enter employer and/or school information
- Modify and delete volunteer records
- Create and manage mail and email lists
- Send email to a volunteer or to a group of volunteers
- Assign up to 3 keywords (user-defined data fields) to each volunteer
- Schedule a volunteer for a specific time and assignment
- Indicate the volunteer's supervisor for each job
- Track the number of hours worked by each volunteer
- Link the hours worked to specific events or programs
- Maintain historical records of volunteer work
- Reward volunteers when they meet service goals set by your organization
- Generate dozens of reports
- Identify which volunteers are students
- Query volunteer records
- Export volunteer records to MS Word (mail merge), MS Excel or to an ASCII tab-delimited text file
- Import names and addresses from MS Excel
- Audit volunteer records
- Track before and after changes to each record
- Restore deleted records
- Track the date volunteer record was added and by whom
- Track the date volunteer record was last updated and by whom

# FUNCTIONALITY LIST

## **VI. PROGRAMS (After-school Programs, Sports Camps, Booster Clubs, Youth Groups, Educational Seminars, Classes, etc.)**

- Define each program offered
- Assign one or more classes to a program (e.g., an after-school program may have several classes such as math skills or swimming)
- Identify funding sources
- Track who solicited the funding source
- Modify program information
- Enter instructor contact information
- Enroll participants or students
- Record pre- and post- assessments including tests given, test results, goals assigned and met (or not met)
- Record class attendance
- Maintain historical records for all programs
- Generate dozens of reports
- Query program and class records
- Export program records to MS Word (mail merge), MS Excel or to an ASCII tab-delimited text file

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## VII. PROGRAM PARTICIPANTS (Students, Clients, Patients, etc.)

- Enter detailed demographic information about each participant – name, address, race, gender, marital status, birth date, etc.
- Indicate who referred the participant to your organization
- Indicate status and category
- Track start and expiration dates
- Print about-to-expire and expired membership reports
- Enter emergency contact information
- Enter legal guardian information
- Enter authorized pick-up information including special instructions
- Track medical history and current medical information
- Enter insurance information including preferred hospital and physician
- Indicate transportation needs for each participant
- Record enrollment fees
- Print cash receipt at time of enrollment
- Assign up to 3 keywords (user-defined data fields) to each participant
- Modify and delete participant records
- Send an email to one participant or to a group of participants
- Create and maintain a mail or email list
- Track services received by participant
- Enter unlimited notes on each interaction with a participant
- Generate dozens of reports
- Maintain year-to-year historical records of all participants
- Query participant records
- Export participant records to MS Word (mail merge), to MS Excel, or to an ASCII tab-delimited text file
- Import participant names and addresses from MS Excel
- Audit participant records
- Track before and after changes to each record
- Restore deleted records
- Track the date participant record was added and by whom
- Track the date participant record was last updated and by whom

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## VIII. CALENDAR

- Add entries (meetings, phone calls, to-do items, pledge due dates) to the calendar as a single or recurring item
- Assign tasks to one or more representatives of your organization
- Indicate which tasks to note when completed
- Link calendar entries to a private donor or a company
- Indicate if calendar entry is associated with an event or a program
- Modify or delete calendar entries
- Identify past due tasks
- Identify completed tasks
- Create pledge reminder and due date entries
- Generate dozens of reports
- Assign up to 3 keywords (user-defined data fields) to each calendar entry
- Query calendar entry records
- Export participant records to MS Word (mail merge), to MS Excel, or to an ASCII tab-delimited text file
- Track the date calendar entry was created and by whom
- Track the date calendar entry was last updated and by whom

## IX. LISTS (Mail, Email, Phone, Distribution)

- Create unlimited lists
- Indicate list type (mail, email or phone)
- Modify and delete list records
- Combine donors (private and public), volunteers and program participants into a single list
- View recipients of each list
- Add and remove recipients from a list
- Send group email to everyone on the list
- Generate dozens of reports
- Export list records to MS Word (mail merge), to MS Excel, or to an ASCII tab-delimited text file
- Track the date list was created and by whom
- Track the date list was last updated and by whom

# FUNCTIONALITY LIST

## X. SEND EMAIL

- Send email to individuals or groups
- Send email to everyone on an email list
- Maintain address books for separate categories of recipients
- Select names from multiple address books for email messages
- Avoid duplicate emails to individuals
- Honor donor requests to not receive email from your organization by automatically excluding their email address

## XI. MAILING LABELS

- Print mailing labels for anyone with a complete address
- Print mailing labels 2-across or 3-across
- Sort mailing labels alphabetically or in zip code order
- Automatically remove duplicate mail labels
- Honor donor requests to not receive mail from your organization by automatically excluding their name and address

## XII. SECURITY (Users)

- Assign a unique user ID and password to each user
- Set permissions by functionality (e.g., user can add and modify a donor record, but cannot delete it)
- Indicate user category (e.g., staff or volunteer)
- Indicate user's status – active or inactive
- Modify and delete users
- Track the date user record was added and by whom
- Track the date user record was last updated and by whom
- Generate user report with or without passwords
- Each user can change his/her password anytime
- Each user can select screen color options

## XIII. REPORTS

- View reports in preview mode
- Publish any report in MS Word
- Email any report as attachments
- Change margins or page format to fit your printer
- Select formatting options for reports that are as complete or as streamlined as needed
- Set the parameters of reports by selecting from a number of options
- Produce reports for one record, all records, or selected records.

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## XIV. QUERIES (Lookup)

- Find records and groups of records by selecting a set of data values, query parameters and options
- Refine the query by adding or removing records
- Generate reports and/or mailing labels for the recordset found
- Add the names of the records found to an existing list
- Export the recordset to MS Word (mail merge), or MS Excel or to an ASCII tab-delimited text file
- Send an email to everyone in the recordset who has an email address
- Display the recordset as a list, or view complete information on each record found

## XV. OTHER

- Use the Global Search feature to find a specific name, word or phrase
- Adjust forms to fit your screen
- Automatically email Customer Service by clicking on the Contact Us icon
- Easily access, and print selections from, the built-in Help book

# FUNCTIONALITY LIST

If you believe that *Patron Software* may be right for you, your staff and your organization, please contact us.

We will be happy to answer your questions about *Patron Software* and your record-keeping needs.

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**Thank you!**