



**Support. Service. Success.**

***Managing a Fundraiser:  
How Patron Software Can Help***

# MANAGING A FUNDRAISER



## Here's the scenario:

It's time to plan the annual Fall Festival Fundraiser.

You're wondering how you're going to manage all of the details.

**When the fundraiser committee needs information,  
will you be able to respond quickly?**

## Your first challenge:

It's 10 a.m.

The phone rings... it's the fundraiser chairperson. By 3 p.m. he needs a list of all corporate donors who have contributed between \$5,000 and \$10,000 in the last three years.

He's requested 23 copies of the report. And can you please email him a copy in advance?

Response #1: There goes your day.

Response #2: **No problem, you've got *Patron Software*.**



# MANAGING A FUNDRAISER

**With Patron Software, entering information is easy, but retrieving information is even easier!**

With our easy-to-learn, intuitive **Lookup Form**, getting the information you need is just a few mouse clicks away

**Lookup Company Records**

**Lookup Category**      **Lookup Parameter**

Select Records that Match ALL Parameters  
 Select Records that Match ANY Parameter  
 Display as List

**Is Blank**    **Is NOT Blank**

**Lookup Options**

Create NEW Lookup  
 ADD TO Current Lookup  
 REMOVE FROM Current Lookup

Refresh Lookup Parameters  
Clear Screen

Company Name -->			
Street Address -->		<input type="checkbox"/>	<input type="checkbox"/>
City -->		<input type="checkbox"/>	<input type="checkbox"/>
State -->		<input type="checkbox"/>	<input type="checkbox"/>
Zip Code -->		<input type="checkbox"/>	<input type="checkbox"/>
County -->		<input type="checkbox"/>	<input type="checkbox"/>
Status -->		<input type="checkbox"/>	<input type="checkbox"/>
Referred By -->		<input type="checkbox"/>	<input type="checkbox"/>
Keyword -->		<input type="checkbox"/>	<input type="checkbox"/>
Representative -->		<input type="checkbox"/>	<input type="checkbox"/>
Has Email -->			
Business Type -->		<input type="checkbox"/>	<input type="checkbox"/>
Group ID -->		<input type="checkbox"/>	<input type="checkbox"/>
Exclude From Mailing -->			
Subscriber -->			
Subscriber Category -->			
Xaction Reference -->			
Pledge Reference -->			
Thank You Letter -->			
	<b>Low</b>	<b>High</b>	
Start Date -->			
Expiration Date -->			
Xaction Amount -->	\$5,000.00	\$10,000.00	
Xaction Date -->	1/1/2006	12/31/2008	
No Xactions -->			

Lookup

Exit

# MANAGING A FUNDRAISER

You can quickly see how many records match your search criteria by looking at the bottom of the form.

The screenshot shows the 'Lookup Companies' form with the following details:

- Search Criteria: XAction Amount Between = 5000 and 10000 AND XAction Date Between = 1/1/2006 and 12/31/2008
- Company Name: Smith And Associates Insurance Co.
- Address: 2105 Park Ave.
- City: Concord, State: NC, Zip: 39265
- County: Shelby, Phone: (610) 499-3000, Fax: (610) 499-3002
- Business Type: Insurance, Referred By: Board Member
- Website: www.smithandassoc.com, Status: Active
- Email: info@smithinsurance.com, Exclude from Mailing: checked
- Subscriber Category: Supporter, Start Date: 1/4/2007, Expiration Date: 1/3/2008

At the bottom right, a green oval highlights the record count: Record: 1 of 79. A red arrow points to this area.

The 'Next Steps' dialog box asks 'What do you want to do next?' and lists the following options:

- Run Reports & Mailing Labels (highlighted with a red arrow)
- Create Mail/Merge Document
- Export to Excel
- Export to .txt File
- Add to a Distribution List
- Send Email
- Exit

The search criteria from the previous form are also visible at the top of this dialog, circled in green.

Now run the report requested by the fundraiser's chairperson.

# MANAGING A FUNDRAISER

Community Outreach Opportunities, Inc.  
Company Name and Address Listing  
XAction Amount Between \$5,000 and \$10,000  
AND XAction Date Between 1/1/2006 and 12/31/2008

<u>Company Name / Business Type</u>	<u>Address</u>	<u>Phone / Fax / Email</u>
Best Bet Rentals Tool Rental	2000 Broughton Circle Suite 1200 Mytown, VA 25707	(977) 435-2322 (977) 435-2366 info@bestbetrentals.com
Community Bank Financial	7999 Highsmith St. Anytown, VA 83922	(510) 493-8866 (510) 493-8844 info@communitybank.com
Patron Software, Inc. Software	201 Lawton Ct. Wilmington, NC 28412	(910) 262-6224 info@patronsoftware.com
Smith And Associates Insurance	2105 Park Ave. Concord, NC 39265	(610) 499-3000 (610) 499-3002 info@smithinsurance.com
Sweet Times Bakery Bakery	12 First Ave. Leland, NC 28451	(910) 877-1234 (910) 877-1254 info@sweettimesbakery.com

***Patron Software's Print Toolbar allows you to alter the default page setup, print the report, email it as an attachment, or publish it in MS Word.***

Page Setup  
Print  
Email as Attachment  
Publish to MS Word



# MANAGING A FUNDRAISER

**You've met the challenge!!!**

It's 10:15 a.m.

The advance copy of the requested report has been emailed and 23 copies are being printed.

You're ready for the next challenge.



**Bring it on!**

# MANAGING A FUNDRAISER

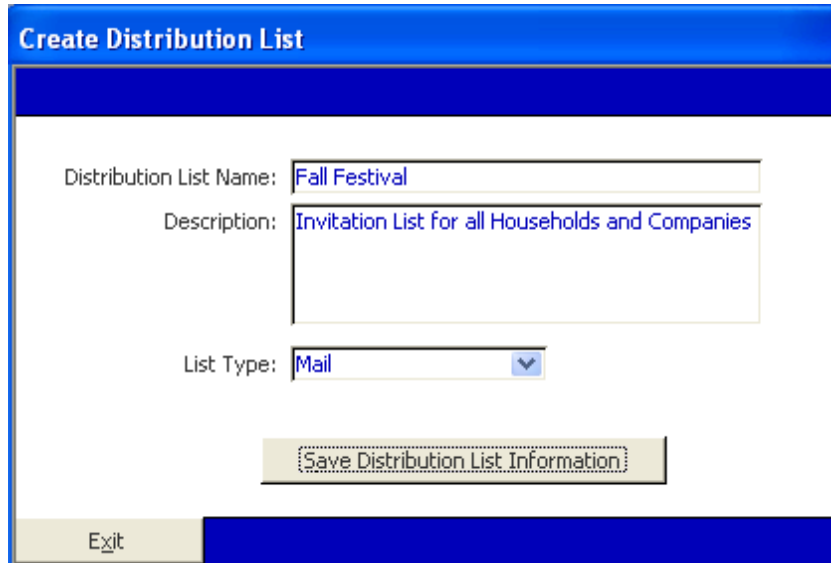
The next challenge is the invitation list.



***With Patron Software, an invitation list can be prepared in 5 easy steps...***

# MANAGING A FUNDRAISER

## Step 1. Create a Distribution List.



The screenshot shows a software window titled "Create Distribution List". It contains the following fields and controls:

- Distribution List Name:** A text input field containing "Fall Festival".
- Description:** A text area containing "Invitation List for all Households and Companies".
- List Type:** A dropdown menu with "Mail" selected.
- Buttons:** A "Save Distribution List Information" button and an "Exit" button.

## Step 2. Determine who should be added to the list.

Do you want to send an invitation to...

- everyone who has made a contribution, or only those who live in your county?
- everyone in a particular company, or only those responsible for donations?

You decide to invite only those individuals who live in your county, plus company contacts responsible for donations.

# MANAGING A FUNDRAISER

## Step 3. Add invitees to the list.

Use the **Household Lookup Form** to find ALL the people who live in your county.

**Lookup Donor Household Records**

**Lookup Category**      **Lookup Parameter**

Select Records that Match ALL Parameters  
 Select Records that Match ANY Parameter  
 Display as List

**Is Blank**      **Is NOT Blank**

**Lookup Options**

Create NEW Lookup  
 ADD TO Current Lookup  
 REMOVE FROM Current Lookup

Refresh Lookup Parameters  
Clear Screen

Family Name --> [ ]  
Street Address --> [ ]              
City --> [ ]              
State --> [ ]              
Zip Code --> [ ]              
**County --> Green**              
Status --> [ ]              
Referred By --> [ ]              
Keyword --> [ ]              
Representative --> [ ]              
Has Email --> [ ]  
Do Not Call --> [ ]  
Do Not Send Mail --> [ ]  
Do Not Send Email --> [ ]  
Subscriber --> [ ]  
Subscriber Category --> [ ]  
Xaction Reference --> [ ]  
Pledge Reference --> [ ]  
Thank You Letter --> [ ]

**Low**      **High**

Start Date --> [ ] [ ]      [ ] [ ]  
Expiration Date --> [ ] [ ]      [ ] [ ]  
Xaction Amount --> [ \$0.00 ]      [ \$0.00 ]  
Xaction Date --> [ ] [ ]      [ ] [ ]  
No Xactions --> [ ] [ ]      [ ] [ ]

Lookup

Exit

# MANAGING A FUNDRAISER

Use the **Next Steps Form** to add these people to your distribution list.

The screenshot displays a software interface for managing households. The main window is titled "Lookup Households" and shows details for a household in "County = Green". The household name is "Hinson", referred by "Newspaper", and has an "Active" status. The address is "330 Belvedere Drive" in "Concord, NC 38277". Contact information includes a home phone of "(810) 222-6633", a fax of "(810) 2...", and an email of "robert@email.net". The greeting is "Bob and Ashley". The household is marked as a "Subscriber" with a start date of "4 / 2 / 2007".

Overlaid on the main window is a "Next Steps..." dialog box, also for "County = Green". It asks "What do you want to do next?" and provides several options:

- Run Reports & Mailing Labels
- Create Mail/Merge Document
- Export to Excel
- Export to .txt File
- Add to a Distribution List** (highlighted with a red arrow and a green oval)
- Send Email

An "Exit" button is located at the bottom of the dialog box.

# MANAGING A FUNDRAISER

Next, use the **Company Contact Lookup Form** to find company contacts responsible for donations.

The image shows a software interface for managing fundraiser contacts. It consists of three main windows:

- Lookup Contact Records:** A search window with fields for 'Lookup Category' and 'Lookup Parameter'. It includes radio buttons for 'Select Records that Match ALL Parameters' (selected) and 'Select Records that Match ANY Parameter', and a checkbox for 'Display as List'. There are also 'Is Blank' and 'Is NOT Blank' options. Search criteria include 'Company Name', 'Name', 'Position', 'Status', 'Keyword', 'Has Email', 'Advertising', 'Sponsorship', 'Volunteers', 'Donations' (set to 'Yes'), and 'Do Not Call'. A 'Lookup' button is at the bottom.
- Lookup Contacts:** A window showing details for a contact. The company is 'Allied Chemical' at '1112 Burkhart Place Mytown'. The contact is 'Mr. Joe Vanderbrink', President, with phone '(610) 338-2765' and email 'joe@email.net'. There are checkboxes for 'Do Not Call', 'Do Not Send Mail', and 'Do Not Send Email'. A 'Status' dropdown is set to 'Active'. There are tabs for 'Demographics', 'Calendar', 'Notes & Keywords', 'Distribution Lists', and 'System Info'. A section for 'Contact's Area of Responsibility...' has checkboxes for 'Advertising', 'Sponsorships' (checked), 'Volunteers', and 'Donations' (checked). There are 'Entry' and 'Update Contact Information' buttons, and a record indicator 'Record 1 of 12'.
- Next Steps...:** A dialog box asking 'What do you want to do next?'. It has a list of options: 'Run Reports & Mailing Labels', 'Create Mail/Merge Document', 'Export to Excel', 'Export to .txt File', 'Add to a Distribution List' (highlighted with a red arrow), and 'Send Email'. An 'Exit' button is at the bottom.

Then add them to your invitation list.

Continue using the **Lookup Forms** (Households, Companies, Volunteers, etc.) to add groups or individuals to your invitation list.

# MANAGING A FUNDRAISER

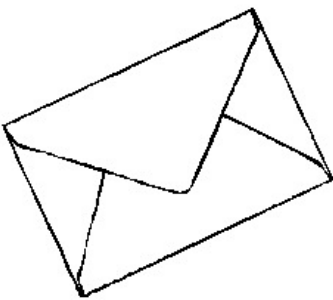
## **Step 4. Print the invitations...**

- Use MS Word mail merge
- Print mailing labels
- Export names and addresses to a text file
- Export names and addresses to a MS Excel spreadsheet

## **... or have them professionally printed.**

You can also send email to everyone on a distribution list or print reports.

## **Step 5. Stuff the envelopes and mail them.**



You need two volunteers Thursday afternoon to prepare the invitations for mailing.

Finding those volunteers is just a few clicks away.

# MANAGING A FUNDRAISER

Use the **Volunteer Lookup Form** to find the volunteers you need.

The image shows two overlapping windows from a software application. The top window, titled "Lookup Volunteer Records", contains a form with various search criteria. Two red arrows point to the "Day Available" dropdown (set to "Thursday") and the "Service Area" dropdown (set to "Administrative"). The bottom window, titled "Lookup Volunteers", displays a table of search results for "Service Area = Administrative AND Thursday = Yes". The table lists six volunteers with their names, addresses, phone numbers, and email addresses. Each row includes a "Go To" button and a "Send Email" icon.

Volunteer Name	Address	Phone / Work / Email	Send Email
Alexander, Jessica	698 Norman Lane Fairway NC 27885-	(788) 657-3221 (603) 444-3789 2 jessica@email.net	
Chen, Sunny	880 Kirby Drive Carolina Beach NC 28428-	(910) 788-6555	
Finelli, Nadine	879 St. Vincent Dr. Leland NC 28375-	(910) 323-7864 nadine@email.net	
Hinson, Robert	330 Belvedere Drive Concord NC 38277-	(810) 222-6633 (810) 993-2288 9 robert@email.net	
Long, Helen	1008 Rosa Ct. Carolina Beach NC 28433-	(910) 343-8877 (910) 777-6633 9 helen@email.net	
Martinez, Dawn	308 White Road Mytown VA 27509-	(977) 555-4444 (866) 777-3320 8 dawn@email.net	

You have identified six volunteers.

Now you can phone each one or send an email.

**It couldn't be easier!**

# MANAGING A FUNDRAISER

The volunteers have finished the job and the invitations are ready to go.

Don't forget to update each volunteer's number of hours worked!

**Apply Volunteer Hours for Volunteer Alexander, Jessica**

Total Hours Worked:	11.8
Current Hours:	11.8
Number of Vouchers Received:	0

Date Worked:	<input type="text" value="8/2/2007"/>	<input type="button" value="Calendar"/>	Accomplishment:	<input type="text" value="Assembled invitation mailing."/>
Number of Hours Worked:	<input type="text" value="4.5"/>		Notes:	<input type="text"/>
Location:	<input type="text" value="Office"/>	<input type="button" value="v"/>		
Service Area:	<input type="text" value="Administrative"/>	<input type="button" value="v"/>		
Event:	<input type="text" value="Fall Festival"/>	<input type="button" value="v"/>		
Activity:	<input type="text"/>	<input type="button" value="v"/>		
Program:	<input type="text"/>	<input type="button" value="v"/>		
Class:	<input type="text"/>	<input type="button" value="v"/>		

Run the Voucher Distribution report to help you identify all the volunteers who have earned a special reward.



# MANAGING A FUNDRAISER

## Congratulations!!

The invitations are in the mail!

Soon you'll start receiving income for the fundraiser.



How are you going to track it?

**No problem, you've got *Patron Software*.**

The key to managing fundraising income with *Patron Software* is to identify income-producing activities such as sponsorships and ticket sales.

For the Fall Festival fundraiser, these include:

- Buffet Dinner
  - ✓ Individual Tickets
  - ✓ Table Sponsors
  - ✓ In-kind Contributions
- Silent Auction
  - ✓ Donated Items
  - ✓ Items Purchased
- General Donations
  - ✓ Underwriter
  - ✓ Cash and In-kind Contributions
  - ✓ Pledges



# MANAGING A FUNDRAISER

First create a record for the Fall Festival fundraiser.

Make sure to enter the financial goal so that progress can be monitored.

Include contact information for the event coordinators.

The screenshot displays a web form titled "Add New Event". The form contains the following fields and values:

- Event ID:
- Start Date:  (with a calendar icon)
- End Date:  (with a calendar icon)
- Event Type:  (with a dropdown arrow)
- Description:
- Goal:  (circled in green with a red arrow pointing to it)

Below these fields is a section titled "Event Coordinators" with two columns of input fields:

- Column 1: Name: ; Phone: ; Email:  (with an email icon)
- Column 2: Name: ; Phone: ; Email:  (with an email icon)

At the bottom of the form is a "Notes:" section with a large empty text area. Below the notes is a "Save Event Information" button. At the very bottom left is an "Exit" button.

# MANAGING A FUNDRAISER

Next add information about each component of the fundraiser, including the financial goal.

### Add Event Activity

Event ID: Fall Festival  
Event Start Date: 9/15/2007      Event End Date: 9/15/2007

Activity ID: Buffet Dinner

Start Date: 9/15/2007      End Date: 9/15/2007

Start Time: 6:00 PM      End Time: 7:30 PM

Location: City Center

Description: Buffet dinner in the ballroom. Tables for 8.

Goal: \$8,000.00

Ticket/Activity/Item Price: \$75.00      Tax Deductible Portion: \$35.00

#### Activity Coordinators

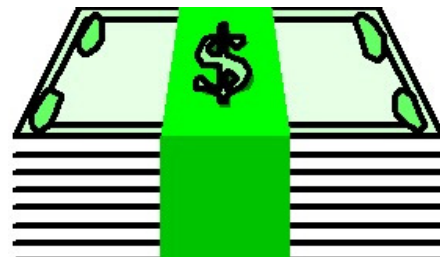
Name: Sarah Wellman      Name:   
Phone: (899) 232-4000      Phone:   
Email: sarah@email.net      Email:

Notes:  
Sarah will be setting up reservations for tables of 8. Special requests will be honored.

Save Event Activity

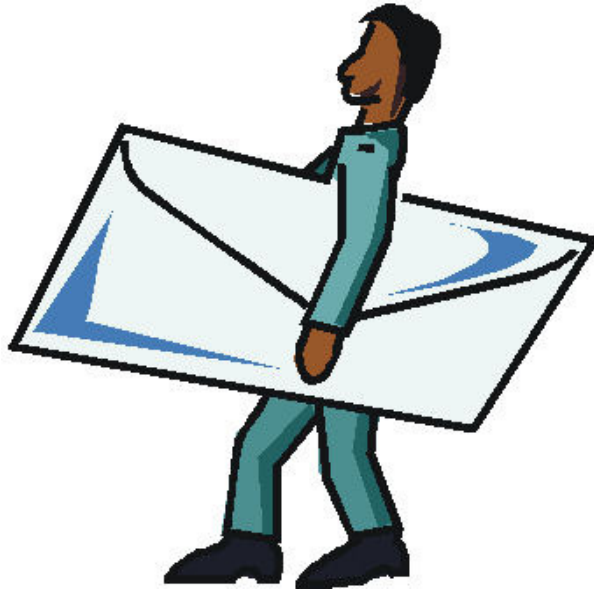
Exit

Now you're ready to record income...



## MANAGING A FUNDRAISER

You've just received a check for \$2,500 from Mrs. Gallagher.



Attached to the check is a sticky note indicating that \$1,000 is for a Table Sponsorship for the Fall Festival. The remaining \$1,500 is to go into the Annual Campaign fund.

Mrs. Gallagher's generous donation qualifies her to receive a gift certificate to a local restaurant.

You need to track each of the above transactions.

***With Patron Software, recording split transactions is no problem.***

# MANAGING A FUNDRAISER

The first entry indicates that this is a split transaction. Record the Table Sponsorship purchase first.

**Don't forget to send a Thank You letter!**

**Household Transactions**

Family Name: Gallagher  
Address: 1554 Wildwood Drive

Split Transaction Total Amount Received: \$2,500.00

Reference / Check / Credit Card #: Check #1602

Transaction Date: 8/30/2007

Transaction Type: Purchase

Payment Method: Check

Received From: Mrs. Gallagher

Event: Fall Festival

Activity: Table Sponsor [VIEW Event Activity Details](#)

Program: [VIEW Program Class Details](#)

Class:

# Tickets, Activities, Items Purchased or Attendees: 1

Amount: \$1,000.00

Tax Deductible Amount: \$250.00

Donated Item's Fair Market Value: \$0.00

Pledge Amount: \$0.00 Pledge Reference #: [View Pledge References](#)

Thank You!  Print Thank You Letter  
Salutation: Dear Mrs. Gallagher  Print a Receipt

Notes: Mrs. Gallagher will send us the names of her guests.

[Save Transaction](#)

[Exit](#)

# MANAGING A FUNDRAISER

The next entry records Mrs. Gallagher's donation.

Notice that some information from the previous entry is automatically filled in (e.g. Reference #, Transaction Date, etc.)

**With *Patron Software*, you have the option of printing a receipt...**

The screenshot shows the 'Household Transactions' form in Patron Software. The form is titled 'Household Transactions' and is for the family 'Gallagher' at '1554 Wildwood Drive'. The total amount received is \$2,500.00. The transaction is a donation of \$1,500.00, recorded on 8/30/2007, via check #1602 from Mrs. Gallagher. The event is the '2007 Annual Fund'. The form includes fields for reference number, date, type, method, recipient, event, activity, program, and class. It also has fields for amount, tax deductible amount, and pledge amount. There are checkboxes for 'Print Thank You Letter' and 'Print a Receipt', with a red arrow pointing to the 'Print a Receipt' checkbox. A 'Save Transaction' button is at the bottom, and an 'Exit' button is in the bottom left corner.

Family Name: Gallagher  
Address: 1554 Wildwood Drive

Split Transaction    Total Amount Received: \$2,500.00

Reference / Check / Credit Card #: Check #1602

Transaction Date: 8/30/2007

Transaction Type: Donation

Payment Method: Check

Received From: Mrs. Gallagher

Event: 2007 Annual Fund

Activity: [VIEW Event Activity Details](#)

Program: [VIEW Program Class Details](#)

Class:

# Tickets, Activities, Items Purchased or Attendees: 0

Amount: \$1,500.00

Tax Deductible Amount: \$1,500.00

Donated Item's Fair Market Value: \$0.00

Pledge Amount: \$0.00    Pledge Reference #: [View Pledge References](#)

Print Thank You Letter

Thank You Letter Salutation:

Print a Receipt

Notes:

[Save Transaction](#)

[Exit](#)

# MANAGING A FUNDRAISER

The final entry records Mrs. Gallagher's complimentary gift certificate.

### Household Transactions

Family Name: Gallagher  
Address: 1554 Wildwood Drive

Split Transaction    Total Amount Received: \$2,500.00

Reference / Check / Credit Card #: Check #1602

Transaction Date: 8/30/2007

Transaction Type: **Complimentary**

Payment Method: Check

Received From: Mrs. Gallagher

Event: 2007 Annual Fund

Activity: Donor Benefit    [VIEW Event Activity Details](#)

Program:    [VIEW Program Class Details](#)

Class:    [VIEW Program Class Details](#)

# Tickets, Activities, Items Purchased or Attendees: 0

Amount: \$0.00

Tax Deductible Amount: \$0.00

Donated Item's Fair Market Value: \$0.00

Pledge Amount: \$0.00    Pledge Reference #:    [View Pledge References](#)

Print Thank You Letter

Thank You Letter Salutation:    [View Pledge References](#)

Print a Receipt

Notes: Gift Certificate to a local restaurant.

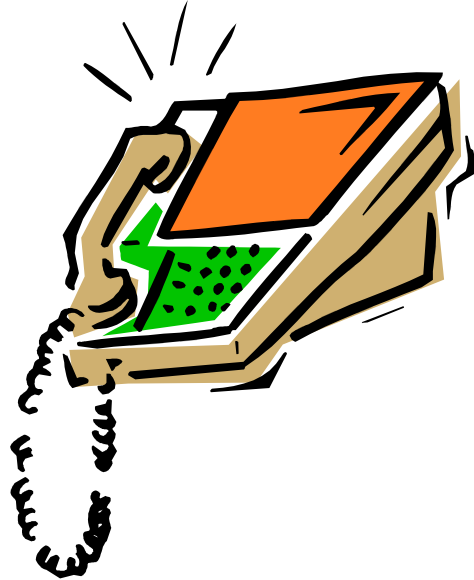
[Save Transaction](#)

[Exit](#)

## MANAGING A FUNDRAISER

You've just returned from a nice, relaxing lunch. It's 1:00 p.m.

You check your messages and find an urgent request from the Fall Festival chairperson.



He needs an up-to-the-minute update on how close the organization is to reaching its fundraising goal.

And, he needs it by 1:30.

**No problem, you've got *Patron Software*.**

With the **Event Goal Comparison Report**, you'll always know how close you are to attaining your financial goal.

# MANAGING A FUNDRAISER

## Community Outreach Opportunities, Inc. Event Goal Comparison Report All Dates Included Fall Festival

**Event Goal: \$36,000.00**

**Buffet Dinner**

**Activity Goal:\$8,000.00**

	<u>Amount</u>	<u>Pledge</u>	<u>Fair Market Value</u>
Household	\$450.00	\$0.00	\$0.00
Company	\$0.00	\$0.00	\$0.00
Participant	\$0.00	\$0.00	\$0.00
	\$450.00	\$0.00	\$0.00

**Concert**

**Activity Goal:\$12,000.00**

	<u>Amount</u>	<u>Pledge</u>	<u>Fair Market Value</u>
Household	\$890.00	\$0.00	\$0.00
Company	\$0.00	\$0.00	\$0.00
Participant	\$0.00	\$0.00	\$0.00
	\$890.00	\$0.00	\$0.00

**Silent Auction**

**Activity Goal:\$10,000.00**

	<u>Amount</u>	<u>Pledge</u>	<u>Fair Market Value</u>
Household	\$3,100.00	\$0.00	\$3,600.00
Company	\$0.00	\$0.00	\$0.00
Participant	\$0.00	\$0.00	\$0.00
	\$3,100.00	\$0.00	\$3,600.00

**Table Sponsor**

**Activity Goal:\$4,000.00**

	<u>Amount</u>	<u>Pledge</u>	<u>Fair Market Value</u>
Household	\$3,000.00	\$0.00	\$0.00
Company	\$0.00	\$0.00	\$0.00
Participant	\$0.00	\$0.00	\$0.00
	\$3,000.00	\$0.00	\$0.00

**Grand Totals:**

Household	\$7,440.00	\$0.00	\$3,600.00
Company	\$0.00	\$0.00	\$0.00
Participant	\$0.00	\$0.00	\$0.00
	<b>\$7,440.00</b>	<b>\$0.00</b>	<b>\$3,600.00</b>

**Event Goal = \$36,000.00**

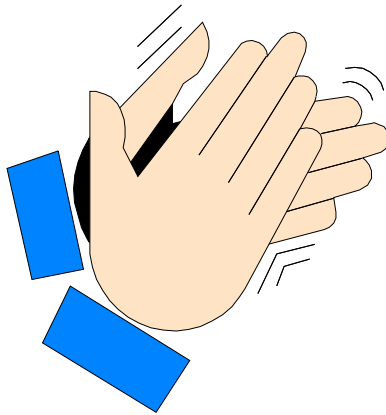
**Total Amount = \$7,440.00**

**Total Pledge = \$0.00**

**Difference = \$28,560.00**

## Congratulations!!

You've met all of the challenges and the fundraiser was a big success!



# MANAGING A FUNDRAISER

## How successful was it?

- How many tickets were sold?
- How many table sponsors did you have?
- How much money did the silent auction raise?
- How many volunteer hours were logged?

The **Transaction Report Options Form** allows you to create the exact report you need.

Company Name	Street Address	City	State
Allied Chemical	1112 Burkhardt Place	Mytown	NC
Best Bet Rentals	2000 Broughton Circle	Mytown	VA
Community Bank	7999 Highsmith St.	Anytown	VA
Community Bank	6 Stevens Place	Mytown	VA
Community Bank	897 14th St., Ne	Richmond	VA
Complete Carpet Service	5890 Croydon Road	Hampstead	NC
Custom Home Builders	P. O. Box 81	Hampstead	NC
Four Winds Café	29 Hansby St.	Wilmington	NC
Patron Software, Inc.	201 Lawton Ct.	Wilmington	NC
Professional Eye Care	5917 Bell Road	Jacksonville	NC
Smith And Associates Insurance C	2105 Park Ave.	Concord	NC
Sweet Times Bakery	12 First Ave.	Leland	NC

# MANAGING A FUNDRAISER

You can now see how well each activity did...

Community Outreach Opportunities, Inc.  
Transaction Report for All Donors  
All Dates Included  
Fall Festival

**Event: Fall Festival**  
**Activity: Silent Auction**

<u>Name / Address</u>	<u>Date</u>	<u>Transaction Type / Payment Method</u>	<u>Amount</u>	<u>Tax Deductible</u>	<u>Pledge</u>	<u>Fair Market</u>
<b>Mr. Michael Davis</b> 1215 Livingston Road Hampstead, NC 28433	9/15/2007	Purchase Credit Card	\$2,500.00	\$700.00	\$0.00	\$1,800.00
<b>Robert and Ashley Hinson</b> 330 Belvedere Drive Concord, NC 38277	9/15/2007	Purchase Check	\$180.00	\$0.00	\$0.00	\$100.00
<b>Mr. and Mrs. Arthur Martinez</b> 308 White Road Mytown, VA 27509	9/7/2007	In Kind In Kind	\$0.00	\$0.00	\$0.00	\$1,400.00
<b>Ms. Lauren Zimmer</b> 109 N. Lincoln Ct. Anytown, NC 33728	9/15/2007	Purchase Credit Card	\$420.00	\$0.00	\$0.00	\$300.00
<b>Silent Auction</b>	<b># Transactions: 4</b>		<b>\$3,100.00</b>	<b>\$700.00</b>	<b>\$0.00</b>	<b>\$3,600.00</b>

<b>Grand Total:</b>	<b># Transactions: 815</b>		<b>\$107,440.00</b>	<b>\$44,040.00</b>	<b>\$87,500.00</b>	<b>\$53,600.00</b>
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... as well as how the whole event did.

# MANAGING A FUNDRAISER

The **Volunteer Log Report Options Form** gives you lots of choices for reporting on Volunteer Hours.

Select ONE or MORE VOLUNTEERS...

Name	Street Address	City	State	Student
Alexander, Jessica	698 Norman Lane	Fairway	NC	No
Chen, Sunny	880 Kirby Drive	Carolina Beach	NC	Yes
Corey, Evelyn	21 Armand Drive	Hampstead	NC	No
Finelli, Nadine	879 St. Vincent Dr.	Leland	NC	No
Fisher, Addison	1552 Market St.	Hampstead	NC	Yes
Gallagher, Kay	1554 Wildwood Drive	Wilmington	NC	No
Hallett, Andrew	1220 Cedar Lane	Wilmington	NC	No
Hinson, Robert	330 Belvedere Drive	Concord	NC	No
Johnson, William	140 Joseph Ct.	Long Beach	NC	No
Long, Helen	1008 Rosa Ct.	Carolina Beach	NC	No
Martinez, Dawn	308 White Road	Mytown	VA	No
O'Malley, Ryan	1420 N. 12th St.	Anytown	NC	Yes

Select Event and Program Options

Event:

Activity:

Show ALL Events and Activities

Program:

Class:

Show ALL Programs and Classes

Select Option

Show ALL

Show Students Only

Show Selected Only

Select Report

Complete

Summary

Select Sort Option

by Name

by Date (Ascending)

by Date (Descending)

Select Report Start and End Dates

Year To Date

Last Year

ALL Dates

Select Dates

Start Date:

End Date:

# MANAGING A FUNDRAISER

Now you want to send a letter of acknowledgement to everyone who contributed to the fundraiser.

Use the **Transaction Lookup Form** to find the complete list.

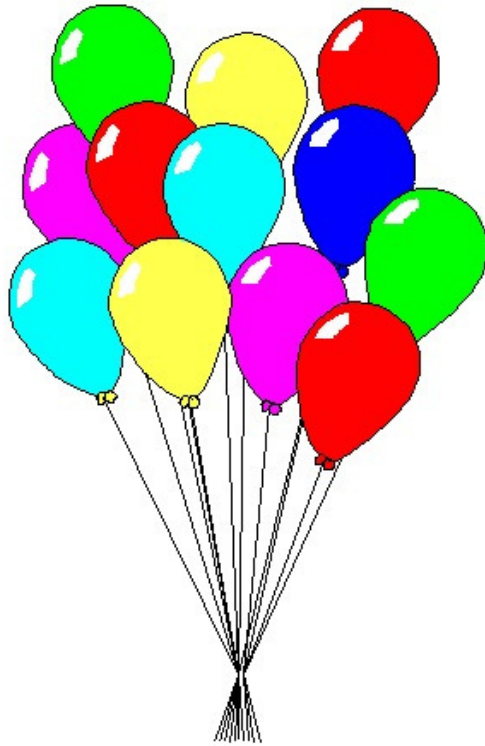
The image shows two overlapping software windows. The top window is titled "Lookup Transaction Records" and contains a form for searching transactions. The "Event" dropdown menu is highlighted with a green circle and contains the text "Fall Festival". The bottom window is titled "Transactions Lookup" and displays details for a donor named "Davis" with the address "1215 Livingston Road, Hampstead, NC 28433". A "Next Steps..." dialog box is overlaid on the bottom window, with a red arrow pointing to the "Create Mail/Merge Document" button, which is also circled in green. Other buttons in the dialog include "Run Reports & Mailing Labels", "Export to Excel", and "Export to .txt File".

Now that you have a complete list, select Create Mail/Merge Document for your personalized letters.

You can also print Mailing Labels.

**Congratulations!!**

**With *Patron Software*, you managed a successful fundraiser from start to finish.**



## MANAGING A FUNDRAISER

**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.**

**(877) 898-3981**

**[info@patronsoftware.com](mailto:info@patronsoftware.com)**

**Patron Software, Inc.  
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Wilmington, NC 28412**

**Thank you!**