



Introduction:

How Patron Software Can Help

INTRODUCTION

About Patron Software

Patron Software was founded in response to a growing need among nonprofit organizations for an affordable solution to their record-keeping and reporting requirements. In many instances, important information about donors, members, clients and volunteers is kept in rolodexes, two-dimensional spreadsheets or someone's memory. By providing a computer application that maintains all of an organization's information in a single location, Patron Software guarantees that important records are safe from accidental loss and that no one is left out of an important mailing.

Patron Software offers a suite of applications that provides a complete view of how each member of your community participates with your organization. Whether you're tracking donations, volunteer hours worked, programs attended, or services received, Patron Software is the single repository you need. Powerful built-in tools empower you in a way never before to understand and explore the relationship between your organization and the community it serves.

Patron Software made the decision to build its platform on Microsoft Office Professional because we believe that the seamless integration of our database with MS Word and MS Excel is invaluable to your organization. For example, with just a few clicks you can produce personalized end-of-year tax contribution letters that include cash and non-cash contributions. Or you can publish a report in MS Word and email it to your board of directors. Or, you can gather statistics about your membership for grant applications. The list of what you can do goes on and on and on.

With most software, having a User ID and Password grants a user access to everything contained within the application. But, with Patron Software, a user must be given permission to perform each function. Information about your donors, members, students and clients, is one of your most valuable assets. Being able to protect sensitive information gives executive directors and staff members peace of mind. So, if you have a volunteer who likes to work with computers and software, you can grant him/her access to enter donor addresses, or volunteer applications, but not to view financial transactions.

The staff at Patron Software is dedicated to making our software easy to learn, and easy to use. It's intuitive and follows the administrative work flow of your office. Entering information should be easy, but retrieving information in a meaningful way should be easy, too. With our robust Lookup feature, just a few clicks of the mouse enables you to find the records you want – and only the records you want! Once you have found them, use Next Steps to decide whether to generate a report or mailing labels, send a group email, add to a mailing list, or create personalized letters using MS Word Mail Merge.

Patron Software is comprehensive without being complex.

[How to Solve the Record-keeping Dilemma](#)

[Patron Software's Functionality List](#)

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Donor Management & Fundraising

All donor management and fundraising software allow you to store donor names, addresses, and contribution amounts. Maintaining good historical records is critical to nonprofit organizations – especially when applying for grants. However, being able to analyze giving patterns and membership involvement is crucial to understanding where your organization is today, so you will know how to plan for the future.

With Patron Software, you have powerful executive reports at your fingertips – reports that identify who has participated in the past, but hasn't participated recently, or who purchased tickets to a past event, but not a current event. Or you can export financial information to a MS Excel spreadsheet for further analysis.

Patron Software helps you establish and monitor financial goals for fundraisers and capital campaigns. With just a few clicks of the mouse, you quickly see how many tickets have been sold, how much you have received in cash and in-kind donations, and how many pledges have been paid and what is still outstanding.

With automatic thank-you letters, you don't have to worry about whether or not a donor has been acknowledged. And, with pledge invoices, you can send a gentle reminder when a pledge payment is due.

Building and maintaining community relationships is vital to the success of nonprofit organizations. With Patron Software you have the option of assigning up to three representatives to a potential donor. Use our unlimited history notes to document each interaction with your donors – meetings, phone calls, emails.

Entering information into a donor and fundraising database is important, but being able to retrieve it in a meaningful way is even more important. With Patron Software's powerful Lookup and Next Steps features, you can zero in on your target audience. For example, your organization is hosting a community career day event for young people. With just a few clicks of your mouse, you can find all of your donors who have teenaged children. Then, send an email, add them to a dynamic mail list, or create a personalized invitation.

You might ask yourself if donor management and fundraising software can really make a difference. The answer is simple. Yes, if it's the right software.

With Patron Software you can document the past, view the present and prepare for the future.

[Managing a Fundraiser](#)

[Running a Capital Campaign](#)

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Volunteer Management

In today's economic environment, nonprofit organizations depend more and more on volunteers. In every community there are willing and enthusiastic people who believe in your mission and who want to help. But for an executive director, managing and organizing volunteers can be a daunting task.

Patron Software can help.

With Patron Software you store information about each volunteer such as days of the week when he/she is available, and what time of the day is preferred. You also know what the volunteer is interested in doing for your organization. Some people prefer to help out in the office, others enjoy tutoring, while others want to be outside painting homes or doing yard work. With just a few clicks of the mouse, you can find the right person for the task at hand.

Aimee, an Events and Membership Coordinator for a nonprofit organization had this to say. "Patron Software has revitalized our volunteer group. By making it easy to find out who's available, when they're available, and their preferred service area, I can quickly identify volunteers who were previously overlooked. Instead of calling the same three or four people all the time, everyone who wants to participate is included. No one is left out."

Use the Volunteer Scheduler to organize when, where, and for what project, each volunteer is to work. Track the number of hours worked and the job each volunteer performed so you can reward each volunteer when he/she reaches a certain level.

With Patron Software's Volunteer Management software, you can know where your volunteers come from – who referred them to your organization, what school they attend or who their employer is. Keeping detailed information about your volunteers helps when applying for grants. It's also a great way to let the community know that you appreciate their support.

By keeping accurate records about your volunteer involvement, your organization can improve its relationship with the community and build loyalty.

[Volunteer Management](#)

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Programs & Services Management

Patron Software's Programs and Services software offers a comprehensive, yet flexible, means of keeping records for students or members who participate in programs offered by your organization, or for clients who receive support and/or services from your organization.

Whether your organization offers after-school programs for young people, addiction rehabilitation classes, or in-home counseling services, Patron Software can help. In many instances, funding sources require you to keep detailed records about how the student, or client, is progressing. With that in mind, Patron Software offers a means of recording pre- and post- program assessments, including goals set and met, or not met, unlimited notes, and in the case of students, final grades. You can also record daily attendance.

Additionally, detailed demographic information such as family configuration, income, gender, race, age, etc., can be kept with each participant's record which is helpful when reporting to funding sources, or applying for grants. And, for the safety of your participants, current medical information, medical history, guardian contact information, and special pick-up information can be maintained along with a photo.

Using Patron Software's History feature, teachers and case workers can enter unlimited notes after each class or interaction (meeting, phone call, in-home visit) with a student or client. Case workers can update the Patron Software Calendar with the next visit, or scheduled contact, with the client.

Organizations that charge fees for program participants can generate a receipt at the time of payment.

Services offered by your organization to members of the community - such as in-home counseling, or meal delivery - are recorded. Many reports are available to help monitor and track the services provided.

With Patron Software, organizing your important information the way you need it organized, requires just a few clicks of the mouse.

[Programs and Classes](#)

[Case Management](#)