



Support. Service. Success.

*Solving the Record-Keeping Dilemma:
How Patron Software Can Help*

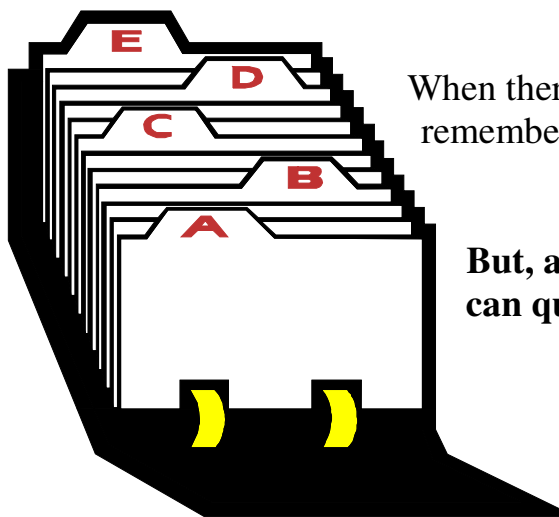
SOLVING THE RECORD-KEEPING DILEMMA

If you prefer spending time **helping others** rather than **managing information**,

Patron Software is the tool for you!

At *Patron Software* we specialize in easy-to-use applications designed especially for the needs of organizations like yours.

Many organizations start out by keeping their important records in file folders, Rolodexes or sticky notes on the desk.

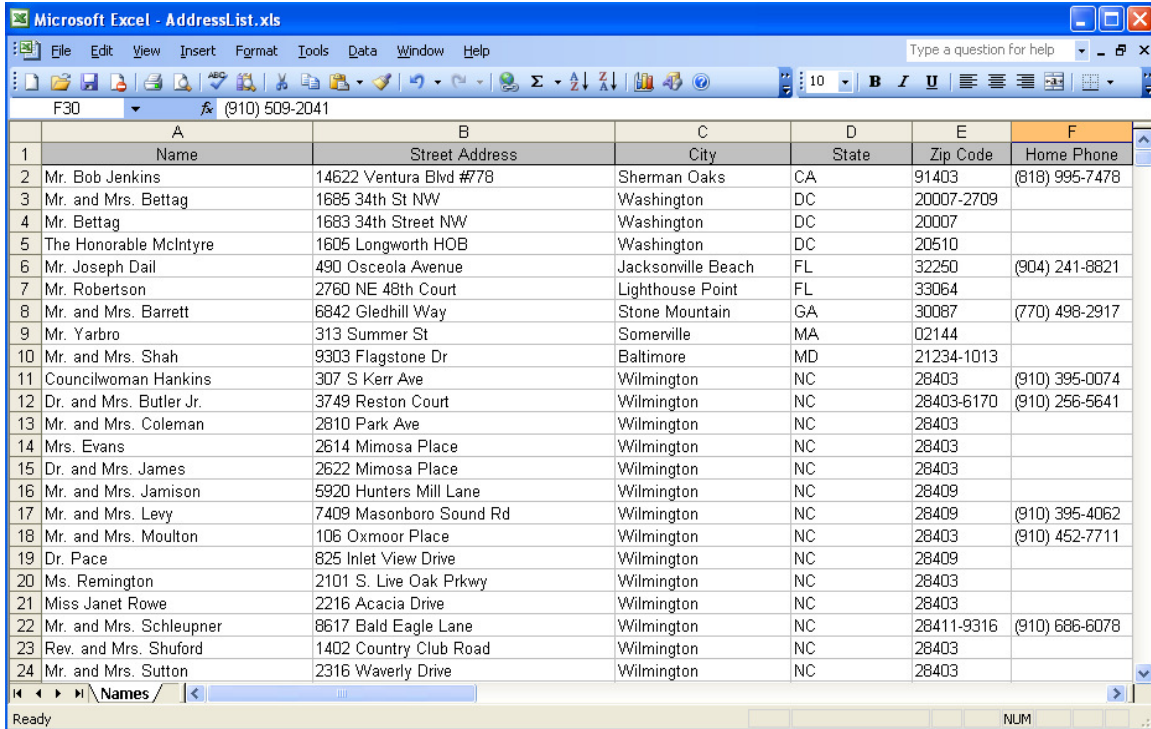


When there are only a few donors, it's easy to remember where the information is.

But, as organizations grow, record keeping can quickly get out of control.

SOLVING THE RECORD-KEEPING DILEMMA

So most organizations move their records from file folders, Rolodexes and sticky notes into a spreadsheet.



The screenshot shows a Microsoft Excel spreadsheet titled "AddressList.xls". The spreadsheet has six columns: A (Name), B (Street Address), C (City), D (State), E (Zip Code), and F (Home Phone). The data is as follows:

	A	B	C	D	E	F
1	Name	Street Address	City	State	Zip Code	Home Phone
2	Mr. Bob Jenkins	14622 Ventura Blvd #778	Sherman Oaks	CA	91403	(818) 995-7478
3	Mr. and Mrs. Bettag	1685 34th St NW	Washington	DC	20007-2709	
4	Mr. Bettag	1683 34th Street NW	Washington	DC	20007	
5	The Honorable McIntyre	1605 Longworth HOB	Washington	DC	20510	
6	Mr. Joseph Dail	490 Osceola Avenue	Jacksonville Beach	FL	32250	(904) 241-8821
7	Mr. Robertson	2760 NE 48th Court	Lighthouse Point	FL	33064	
8	Mr. and Mrs. Barrett	6842 Gledhill Way	Stone Mountain	GA	30087	(770) 498-2917
9	Mr. Yarbro	313 Summer St	Somerville	MA	02144	
10	Mr. and Mrs. Shah	9303 Flagstone Dr	Baltimore	MD	21234-1013	
11	Councilwoman Hankins	307 S Kerr Ave	Wilmington	NC	28403	(910) 395-0074
12	Dr. and Mrs. Butler Jr.	3749 Reston Court	Wilmington	NC	28403-6170	(910) 256-5641
13	Mr. and Mrs. Coleman	2810 Park Ave	Wilmington	NC	28403	
14	Mrs. Evans	2614 Mimosa Place	Wilmington	NC	28403	
15	Dr. and Mrs. James	2622 Mimosa Place	Wilmington	NC	28403	
16	Mr. and Mrs. Jamison	5920 Hunters Mill Lane	Wilmington	NC	28409	
17	Mr. and Mrs. Levy	7409 Masonboro Sound Rd	Wilmington	NC	28409	(910) 395-4062
18	Mr. and Mrs. Moulton	106 Oxmoor Place	Wilmington	NC	28403	(910) 452-7711
19	Dr. Pace	825 Inlet View Drive	Wilmington	NC	28409	
20	Ms. Remington	2101 S. Live Oak Prkwy	Wilmington	NC	28403	
21	Miss Janet Rowe	2216 Acacia Drive	Wilmington	NC	28403	
22	Mr. and Mrs. Schlepner	8617 Bald Eagle Lane	Wilmington	NC	28411-9316	(910) 686-6078
23	Rev. and Mrs. Shuford	1402 Country Club Road	Wilmington	NC	28403	
24	Mr. and Mrs. Sutton	2316 Waverly Drive	Wilmington	NC	28403	

For one brief moment, their donor name and address list is complete and under control.

But as time passes, events occur that require additional columns be added to the spreadsheet:

- Donations
- Ticket purchases
- In-kind contributions
- Volunteer hours
- Membership enrollment

and more...

SOLVING THE RECORD-KEEPING DILEMMA

Eventually, names are entered twice, misspellings begin to occur and records become ever more difficult to search and retrieve.

And soon it becomes clear that a spreadsheet is not a valid long-term solution.



But what else is there?

You know you need your information to be in one place, easy to enter, easy to retrieve, protected and secure.

You also know that you have budget constraints, so whatever solution you find must be affordable.

You're closer to a solution than you think.

***Patron Software* is a proven record-keeping system that is as simple as you want it to be, or as sophisticated as you need it to be.**

Keep reading to learn how ***Patron Software*** can help you with the day-to-day management of your organization.

SOLVING THE RECORD-KEEPING DILEMMA

With *Patron Software*, all of the information in your file folders, spreadsheets, on your Rolodex cards and sticky notes is pulled together into one place.

Even more important, you can find the exact information you need with just a few clicks of the mouse.

And once you have that information, *Patron Software* gives you the tools to do what you need to do.

Whether it's printing a report, sending email, creating a mail/merge document, exporting to a spreadsheet or adding names to a distribution list...

...Patron Software is there to help you from start to finish.

Every level of your organization benefits from *Patron Software*.

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graph TD; A[Board of Directors] --- B[Executive Director]; B --- C[Office Manager and Staff]; C --- D[Volunteer Corps];
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Board of Directors

Executive Director

Office Manager and Staff

Volunteer Corps

SOLVING THE RECORD-KEEPING DILEMMA

For the Board of Directors, *Patron Software*...

- Helps build relationships with donors and improve the bottom line
- Monitors the progress of each capital campaign or fundraiser
- Provides stability and continuity during personnel and board member changes
- Aids in the decision-making process
- Simplifies grant application and reporting to funding sources



For the Executive Director, *Patron Software*...

- Releases the executive director from time-consuming tasks to focus on steering the organization into the future
- Assists in providing information to the board of directors and others
- Improves the organization's day-to-day operations
- Keeps donor information secure
- Solves the record-keeping dilemma

SOLVING THE RECORD-KEEPING DILEMMA

For the Office Manager and Staff, *Patron Software...*

- Adapts to the office's work flow and terminology
- Improves relationships with volunteers
- Stores information in one place for easy access
- Integrates with other MS Office products such as Word and Excel
- Provides a toolset to help manage day-to-day tasks more efficiently



For the Volunteer Corps, *Patron Software...*

- Provides built-in help
- Tracks the number of hours worked
- Schedules work dates and times
- Profiles volunteers for availability and areas of interest
- Keeps personal and sensitive data secure from accidental changes or deletions

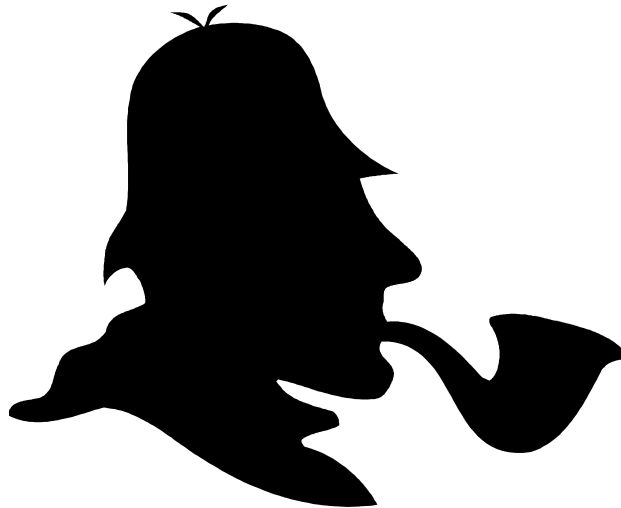
SOLVING THE RECORD-KEEPING DILEMMA

By keeping your records in *Patron Software*, your organization can:

- Facilitate personnel changes
- Maximize staff efficiency
- Secure sensitive information
- Retrieve valuable information with just a few clicks
- Pay no annual contract or monthly maintenance fees
- Secure funding sources by maintaining accurate records

... and SO MUCH MORE!

With *Patron Software*, your record-keeping dilemma is solved!



SOLVING THE RECORD-KEEPING DILEMMA

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

**Patron Software, Inc.
201 Lawton Circle
Wilmington, NC 28412**

Thank you!