Database Conversion Evaluation Checklist

- Before proceeding down this checklist we understand that not all of the following items will apply to your organization

- We recommend you run the **Top (10) Donor Report**, print that list out, and look these Accounts up to do your review [go to: Report/Export, Special Reports, Account Reports, Top Donor Report, select Donors (10), by Received Amounts]

Accounts *(Donors/Prospects)*

- ❑ Find Account—look up various Accounts such as:

❑ People you know ❑ Your own account	❑ Businesses ❑ Foundations

- ❑ Names
- ❑ Addresses
- ❑ Phone Numbers
- ❑ Email Addresses

- ❑ Short Salutation
- ❑ Long Salutation
- ❑ Notes

Persona Types (*optional*):

❑ Personal ❑ Business ❑ *Joint*	❑ *Contact* ❑ *Seasonal* ❑ *Vacation*

Common Persona Defined Fields:

❑ Envelope Salutation ❑ Contact Person (or	❑ Job Title ❑ Spouse Name

Company)	

- ❑ Recognition Name (includes “Anonymous”)
- ❑ Individuals
- ❑ Organizations

- ❑ **Relationships**

Defined Fields *(Codes)*

Common Defined Fields:

❑ Mailing Status ❑ Account Type, Constituent Type ❑ Affiliations ❑ Giving Levels	❑ Memberships ❑ Volunteers ❑ Solicitors	❑ Other fields

Journal

Notes & Contacts

Common Journal Note Defined Fields:

❑ Birthdays ❑ Date Entered	❑ Memberships	❑ Giving Levels

Gifts

- ❑ Approaches
- ❑ Campaigns
- ❑ Funds
- ❑ Payment Types (e.g., Cash, Check, Credit Card, In Kind, EFT- Direct Deposit)
- ❑ Pledges
- ❑ Pledge Payments

- [ ] Pledge Schedule (installment amounts, frequencies—mthly, qtrly, annually)
- [ ] Pledge Write offs
- [ ] Tributes (e.g., Memorials, Honorariums)
- [ ] Matching gifts
- [ ] Soft Credits
- [ ] Gifts with Non-deductible portions
- [ ] Split Gifts
- [ ] Recurring Gifts
- [ ] Recurring Gift Schedule

Reports, Queries, Exports to Run

- [ ] Top Donor Report
- [ ] Fund Activity Summary
- [ ] Pledge Report
- [ ] Name, Address, Salutation in System Exports

Oh, Canada!

- [ ] As you know the Receipting regulations are different for you. You need to get set up with our eReceipt

Additional Things To Review

Below are several examples of questions to ask yourself to facilitate the testing process:

- ❑ (1) Did you do a sample mailing? Make sure you have Names, Addresses, appropriate Salutations for Individuals, "Couples", and Organizations
- ❑ (2) Did you do a sample mailing using Joint Personas?
- ❑ (3) Did your mailing include both organization and individual accounts?
- ❑ (4) Does the giving history match your old system? [see #16!]
- ❑ (5) Did you run the reports that your accounting department needs?
- ❑ (6) Did the funds, campaigns & approach totals match your old system?
- ❑ (7) Did you run a query for all your soft credits?
- ❑ (8) Did you create queries and get the total count for the major segments in your database?
- ❑ (9) Did you run a query for all pledge write offs?
- ❑ (10) Did you check the totals on your Tributes?
- ❑ (11) Were you able to find the important notes you'd made on your VIP accounts?
- ❑ (12) Did you run queries for various Mailing Status defined field values (e.g., Deceased)?
- ❑ (13) If you have General Ledger #s that go to your accounting department or fund accounting software, did you check these?
- ❑ (14) Did you run a test export of transactions for your acctg software to import?
- ❑ (15) Did you create some 'Single criteria' based Defined Field queries to see if the #s are reasonable?
- ❑ (16) OH CANADA! As you know the Receipting regulations are different for you. You need to get set up with our eReceipt
- ❑ (17) Did you run the following reports?

  Special Reports

  - ❑ Fund Activity Summary
  - ❑ Approach Activity Summary
  - ❑ Campaign Activity Summary
    - ✓ Running the Fund Activity Summary will give you a grand total of your donations. Compare that number to the total donations in your old system