

ContribuTrac Quick Start Guide

Hello, and thank you for choosing Durkee & Associates' ContribuTrac, a fundraising and contribution tracking application that integrates with our services.

Installation

Do the download thing from www.contributrac.com our installer will walk you through the process, it's quick and easy.

Starting Up

Double-click on the ContribuTrac Icon on your desktop, wait as the program accesses the internet to obtain the latest software updates, and then starts up.

If It's Your First Time

If it's your first time starting up, you'll need to enter your passkey. If you don't have one, or don't remember it, contact us. Afterwards, you'll be logged into a committee, but you won't see any data. Click the Update button to download the data from us. You'll need to do this for each Committee you have access to. (You can switch committees with the committee button. If you don't have a committee button, it's because you only have access to one committee.)

The main window



The main window is divided into six sections:



(1) The bar across the top is called the **Toolbar** and it contains control buttons. These buttons are the primary way to control the program, modify settings, and manipulate the data being displayed on screen.

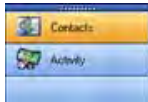
The left-hand side of the window is the **Navigator**, the Navigator allows you to switch between viewing and working with different types of data, and to save your work. The Navigator is divided into three parts which are explained below.



(2) The uppermost box in the **Navigator** indicates what sub-set of the data is being viewed in the data area of the main window, and allows you to switch. When viewing Contacts you can choose between viewing and using Individual, Business, and Committee records. When viewing Activity, you can choose between viewing Monetary, In-Kind and Returned Check records.



(3) The middle box in the **Navigator** shows the default views and any saved views (views will be explained later) for the particular set of data that you are viewing or working with.



(4) The lowermost box in the **Navigator** allows you to switch from viewing and using data on contributors (Contacts) to viewing and using data on contributions (Activity).

Name	Address	City	State
Marko, Howard	21 Oakmont Dr	Los Angeles	CA
Marot, Stanley	440 21st St	Santa Monica	CA
Mannan, Eileen	8115 Rock Ridge	Oakland	CA
Marshall, Thurg	5750 Little Fall	Arlington	VA
Martin, Alberto	1291 St Joseph	Los Altos	CA
Martinez, Marc	1265 Palomar	Tracy	CA
Maxwell, Isabel	1775 Green St	San Francisco	CA
Mayer, Patricia	4258 Vinlon Av	Culver City	CA
McAllister, Karen	1410 Rodes Rd	Arcadia	CA
McCaffery, Mich	2770 Sand Hill	Menlo Park	CA

(5) The biggest part of the main window is taken up by the **Data Viewing Window**, this is where the current set of data you are viewing or working with is displayed.



(6) The **Status Bar** across the bottom of the main window shows which committees are active, and the number of records visible in the data viewing window.

Viewing Contact Information

When ContribuTrac first starts up, information on Individual Contacts is displayed. To view information on Business or Committee Contacts, select either Business or Contact from the **Navigator** (2).

Viewing a Contact Record

Double-click on a line in the **Data Viewing Window** (5) and a small window (called the Edit Contact Record) will appear that will show you all the information for that contact, including full name, address, occupation and employer (if the contact is an individual), phone number etc.

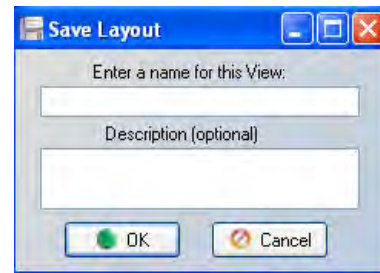
Editing Contact Information

To change or update information for a contact (Individual, Business, or Committee), double-click on that contact's record in the data viewing window and the **Edit** window will come up. Change the information contained within and click 'Save'.



Changing/Saving Views

If you've formatted the way the data viewing window looks by changing fonts or if you've sorted or filtered the data in a particular way, and you don't want to lose these changes when you close the program, you can save the View. At any point in using the program, all the changes you've made in viewing, filtering, or sorting the data can be saved so you can go back to it later. (Changes to the actual data, like updating an address, are always immediately saved.) To do this, click the 'Save View' button on the **Toolbar**.



Viewing Contribution Activity Information

To view information on Contribution Activity, select Activity from the lower **Navigator** window (4). Information on monetary contributions will load in the main viewing window.

Printing

Once you have the information in the data viewing window (5) sorted, filtered, formatted, etc, the way you want, you can print it out. Printing will print exactly what you are viewing in the data window, exactly the way you're viewing it. Changing the width of a column in the data viewing window will change the width of the column on the printed page.



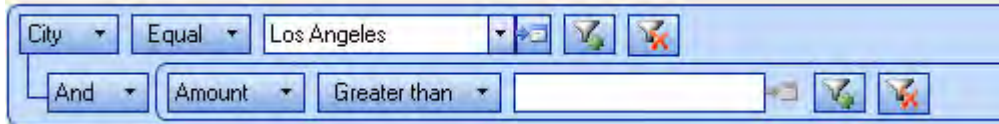
To view exactly what the print job will look like before you print it, click on the 'Preview' button in the control bar (1). From this window you can modify certain page settings, view all the pages you'll be printing one by one, and execute the print command.

To simply print right from the main screen, click the 'Print' button in the control bar.

Sorting by Column Header

To sort the data you're looking at by one of the fields being displayed in the main window, simply click the box at the top of that column that contains the name of the field and the data will be arranged in ascending/descending order based on that field.

Creating a Simple Filter (example)



Do you only want to view Contacts with (818) area codes? A filter can accomplish that.

- 1) Click 'Change' on the **Toolbar** (1), then click 'Filter View' on the menu that appears.
- 2) In the **Filter Conditions** window that appears click on 'New'.
- 3) Select Phone from the "Fields" pull down menu, then select BeginsWith from the "Conditions" pull down menu, and enter '(818)' for Value 1.
- 4) Click Ok.

The main data window will now only show records with (818) area codes.