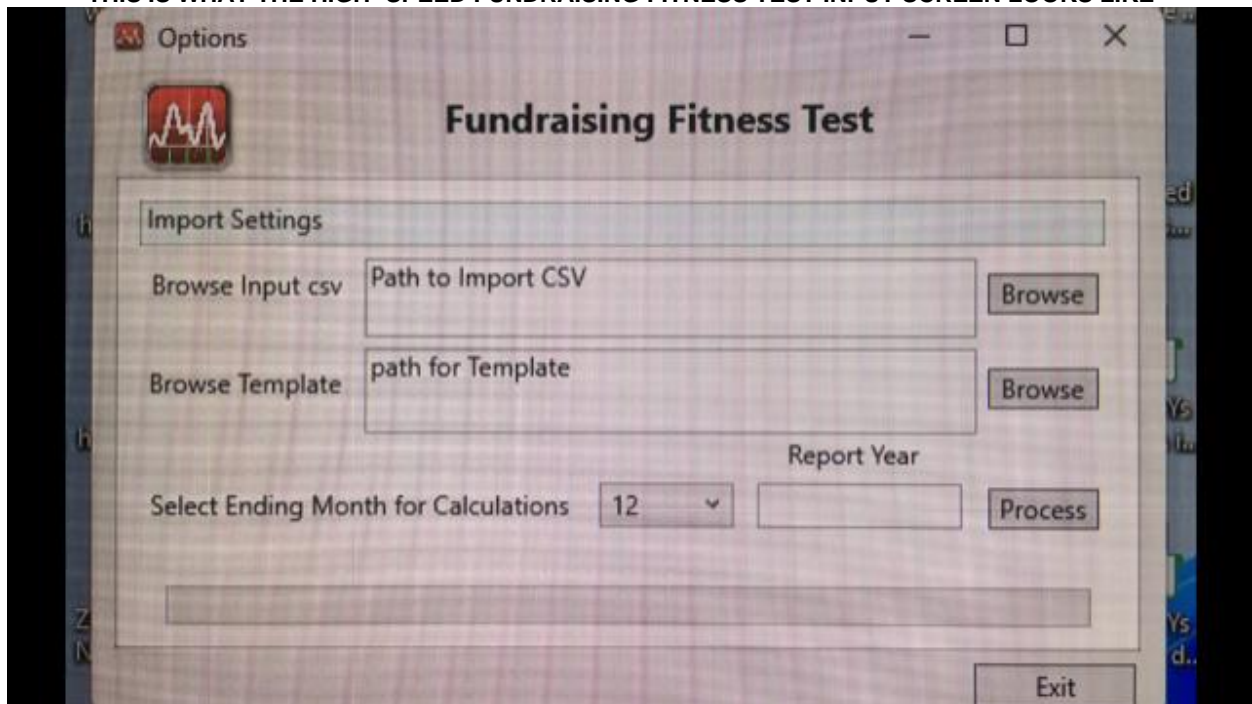


STEPS TO INSTALL THE HIGH-SPEED FUNDRAISING FITNESS TEST

- 1) Click link for the zipped file on website
- 2) In the Downloads pop-up box Click Open File below the ZIPPED file name
- 3) DOUBLE-CLICK FFT.EXT file
- 4) In pop-up box, click EXTRACT ALL
- 5) In password pop-up box type **Fitness23!**, then click OK
- 6) DOUBLE-CLICK second Download file names FITNESSTESTTEMPLATE.EXE
- 7) In pop-up box click EXTRACT ALL
- 8) In pop-up box click EXTRACT
- 9) In FFT INSTALLATION folder DOUBLE-CLICK FFT.EXE file with red square with white line-graph
(your IT department may block your ability to install the program at this point)
- 10) If Microsoft Defender box pops-up, Click More Info, then Click Run Anyway
- 11) In SETUP Wizard pop-up box click NEXT 4 TIMES, then click INSTALL, then click FINISH

THIS IS WHAT THE HIGH -SPEED FUNDRAISING FITNESS TEST INPUT SCREEN LOOKS LIKE



STEPS TO RUN THE FUNDRAISING FITNESS TEST REPORTS

- 1) In FUNDRAISING FITNESS TEST 1st BROWSE window, DOUBLE-CLICK on your 3 column export file
- 2) In FUNDRAISING FITNESS TEST 2nd BROWSE window DOUBLE-CLICK TEMPLATE.XLSM
- 3) Set ENDING month by selecting NUMBER of corresponding month from dropdown menu
- 4) TYPE 4-digit YEAR for END POINT of reports, then click PROCESS
- 5) TYPE name of report, then click SAVE
- 6) When green progress bar stops and numbers appear in the yellow cells, Click the < at the bottom-left corner of the window several times until TOP INDICATORS report is visible
- 7) Click on TOP INDICATORS worksheet and RE-SAVE the file so it opens to 1st report automatically
**The TOP INDICATORS are performance indicators that will show improvement the next time you run the Fundraising Fitness Test, depending on how you invest your staff time and budget*

EXPORT TIPS

What to Export:

All cash gifts & pledge payments (exclude unpaid pledges & in-kind gifts that are not converted to cash).

Include 7 years of data to fully populate the trends report.

Fields and Format for Export:

The Donor ID# (to link multiple gifts), Date & Amount of each gift.

If a Header Row (Column Titles) is exported, this row must be deleted before this program can process the reports.

If file is not exported as a CSV it must be re-saved as a CSV for this program to process it (this also eliminates formatting codes).

Raiser's Edge Gift Transaction Data Export Steps:

- 1) Create a gift query with GIFT DATE OPERATOR "Greater Than or Equal to" and then specify the starting date
- 2) Use the "and" to choose cash as gift type, and specify GIFT AMOUNT greater than or equal to \$0.
- 3) On the output tab, select CONSTITUENT ID NUMBER, GIFT DATE and GIFT AMOUNT.
- 4) Run Query
- 5) Export to Excel (as a CSV if possible)

eTapestry Gift Transaction Data Export Steps:

- 1) For Data Return Type, select JOURNAL ENTRIES.
- 2) For Starting Criteria: for Category, select BASE, and for Query, select ALL Constituents.
- 3) For Criteria, under Available Fields, select COMMONLY USED FIELDS from the drop-down menu. Choose INDIVIDUAL TRANSACTION RECEIVED.
- 4) For Individual Transaction Received, set the parameters to GREATER THAN OR EQUAL TO \$1.00.