



Exceed! by Telosa™ is a powerful, affordable and easy-to-use fundraising and information management software solution, connecting mid-sized nonprofits to their mission and donors. Exceed! empowers nonprofits to develop stronger relationships with their donors, prospects and other constituents while enabling them to save time, be more productive and get exceptional value.

Contact us for a
FREE DEMO CD

Visit us at:
www.telosa.com
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to get started.



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A Team of
Trusted Advisors.
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Exceed! Premier 8.0 - General Enhancements

Application Setup

New codes:

- Guest priority code now available
- Guest stay location code now available

Code changes:

- Guest staff code phone number added
- Guest charge type amount added
- Guest room extension number and max capacity added

New options:

- Input mask on user fields for gift and guest (MYOB fields)
- Australian phone format added
- Lock gift transactions by date
- Background wallpaper has been updated

Security

- New Guest Manager screen options
- User login transaction log
- Record delete option now available

Biographical

- County field can be disabled
- Certain biographical fields can require data entry before saving
- Zip code lookup has been updated and includes Australian codes
- Docx and pdf files attached to Actions will automatically open

Gifts/Pledges

- Locked field option for posted gifts
- Warning on gift edit if gift is posted
- Sales paid checkbox added to Gifts screen
- Gifts search screen for easy donation lookup
- Significantly improved Canadian receipting

Guest

- Context sensitive help added for Guest module
- Certain guest fields can require data entry before saving
- Auto fill of birth date from People tab
- Additional stay types added
- Ability to mark guest as checked out
- Request list tracking
- Ability to track multiple patients in same room
- House Manager screen for improved room maintenance

Contact us Today!

Call or e-mail Telosa today and we'll show you how Exceed! can empower you to spend more time in front of your donors, and less time in front of your computer.

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What's New in 8.0 - Volunteer

Exceed! Premier 8.0 - Volunteer Features

Reporting

Volunteer Birthday Report

- Added options to include address, phones, email.
- Added option for more than one month per report.
- Added more sort order options to various volunteer reports.

Data Entry Fields

First/Last Volunteer Date

- Created an anniversary date, displayed on Overview tab and calculated from the work dates.

Status Radio Button

- Added a default setting for status on Application Setup.
- Added status choices of "None" and "Applied".

Event Code to Volunteer Module

- Event code added everywhere that Project Code appears.

More User-Defined Fields to Overview Tab

- Added two user-defined pick lists to Overview tab.

Display Age Next to Birthday

- This is now an option on Application Setup screen.

Other

Decouple Scheduling from Availability

- Option on Application Setup to turn off the warning on Availability tab when scheduling someone.

Custom Total for Hours

- Ability to define the hours to be counted and used on reports or to assign awards. Includes the ability to count years as well as hours.

Flexibility for Schedule Creation

- Added biweekly and monthly options.
- Added same day on recurring weeks: 1st week, 2nd week, etc. (as in schedule the 3rd Thursday of each month)
- Added a calendar from which you can select multiple random days at once.

Set People Choice on Activation

- The volunteer screen now defaults to the same People record as selected on the Bio screen rather than the primary person.

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