

## Donor Management

- Field & screen flexibility
  - Unlimited number of donor records
  - Unlimited number of fields per record
  - User-defined fields & screen flexibility
    - Add fields
    - Remove fields
    - Change fields
    - Reposition fields
- Unlimited codes & classifications per field/record
- Biographic/demographic data
- Prospect cultivation & tracking
- Donor segmentation
- Joint & separate giving records for other household members
- Multiple donor addresses & salutations
- Track relationships between records
- Smart search to easily lookup records
- Instant e-mail or letter from record
- Instant donor profile reports
- Unlimited notepad
- Multi-year donation summaries
- Solicitor tracking
- Secured access to sensitive data for each user
- Access from unlimited workstations with passwords
- Duplicate record checking tools
- Setup of data entry defaults/pick lists
- Global change of data
  - Track updates to records
- Archive records

## Contact Management

- Unlimited history and notes
- Major donor moves management
- Assign due dates to tasks
- Automatic To-Do/Tickler List
- Tracks each contact item
- Automatic logging of e-mails, solicitations and thank-yous

## Mailings and Communication

- Create solicitations, thank-you letters, and other correspondence
  - Mail merge (personalize correspondence with donor data)
- Maintain history of mailings per donor
  - Track solicitations, acknowledgments/thank-you letters
  - Track success of solicitations
- Mass mailings
  - Ability to select full or subset of donors

- Overwrite auto-created addressee/mailing names
- Multiple-mailing addresses
- Mailing restrictions option (No mail, no solicitations, etc.)
- Batch processing
  - Automated thank-you notes
- Address labels
- Bulk Mail Reports
- Exports to mail houses
- E-mails
  - E-mail personalization
  - Broadcast or specific email letters, campaigns
  - HTML formatted
  - Surveys

## Gift Management

- Unlimited gift history
- Unlimited gift coding
  - Campaigns
  - Appeals
  - Fund Designation
- Automatic summary of gifts by
  - Year
  - Type
  - User specified criteria
- Allows assignment of appropriate acknowledgements at entry
- Receipts
- Split gifts
- Honorariums and memorials
- Gift batching and audit trails (better term?)
- Deposit slips
- Soft credits
- In-kind gifts
- Matching gifts
- Anonymous gifts
- Import online & EFT donations
- Giving Analysis Reports
  - LYBUNT
  - SYBUNT
  - Largest
  - Most Recent

## Pledge Processing

- Track pledges
- Track unpaid pledge balances
- Unlimited payment schedules
- Automated pledge reminders

- Pledge reminder letters
- Credit card payments
- ACH payments
- Reports & Analysis
  - Delinquent pledges
  - Pledge listings
  - Cash flow projections

## Queries and Reports

- User-friendly query interface
- Create custom queries on any field
- Save and/or sort queries
- Standard, pre-designed development reports
  - Large selection of standard development reports
    - Statistical analysis
    - Solicitation analysis
    - Income analysis
    - Donor Profiles
  - Campaign analysis
  - User-determined ranges, summaries, counts and totals
  - Graphical analysis (internal or exported to other software, e.g., Excel™)
  - Modify pre-designed standard reports
- Custom Report Writer
  - Built-in or external report writer
  - Create reports on any field, including user-defined fields
  - Save modified reports for future use
  - Sort, select and sub-total on any field
  - Use any formats, fonts, spacing, colors, images, and placement
  - Print preview
  - User-friendliness (step by step guide, graphical interface)

## Membership Management

- Track membership levels, dues, and renewal
  - Print/e-mail renewal notices
  - Manage multiple membership programs
  - Track gift memberships
  - Reports
    - Acknowledgements
    - Custom Membership cards
    - Membership Analysis
    - Membership Lists

## Special Events Management

- Banquets, dinner dances and shows
- Walk-a-thons, bike-a-thons, telethons
- Auctions
- Golf tournaments
- Sponsored events

- Track registration and actual attendance
- Manage guests and seat assignments
- Track volunteers assignments
- Payments
  - Online
  - Offline
- Issue/create tickets

### **Volunteer Management**

- Maintain contact data
- Track skills and interests
- Track availability
- Create/maintain schedules
- Track actual work time

### **Grants Management**

- Calendar for grants deadlines
- Track proposal tasks
- Research (interface with grants research capabilities)
- Track grant disbursements
- Distinguish between requested & actual funding
- Track grant funding status

### **Student/Alumni features**

- Schools attended
- Graduation year
- Major
- Alumni reports and mailings
- Student listings

### **Accounting Interface**

- Interfaces to accounting application
  - QuickBooks
  - MIP
  - Great Plains
  - Others

### **Internet Functionality**

- Online Transaction Processing
  - Donations
  - Event registration
  - Fundraising item sales
- Opt-in Prospect/e-mail collection
- Browser-based version

## Product Support

- Includes product updates
  - Frequency of updates \_\_\_\_\_
- Phone support
  - Support hours of operation \_\_\_\_\_
- Size of support department
- Newsletters

## Training

- Classes (Offered where?) Cost \_\_\_\_\_
- On-site Cost \_\_\_\_\_
- Telephone Cost \_\_\_\_\_
- Web Cost \_\_\_\_\_