

The logo features a stylized tree with roots and leaves on the left. To its right, the text "Fundraising Software" is written in a serif font, and "GUIDE" is written in a large, bold, sans-serif font. The entire logo is set against a dark, textured background.

Fundraising Software **GUIDE**

Product Evaluation Checklist

Donor Management

- Field & screen flexibility
 - Unlimited 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 donor profile reports
- Unlimited notepad
- Multi-year donation summaries
- Solicitor tracking
- 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 personalized solicitations, thank-you letters, and other correspondence
- Instant e-mail or letter from record
- Mass mailings
 - Ability to select full or subset of donors
 - Mail to multiple addresses for donor
 - Automated mailing restrictions option (No mail, no solicitations, etc.)
 - Produce appropriate letter (based on thank you code)
 - Feature to ensure all gifts are acknowledged only once
 - Print address labels
 - Bulk mail reports
 - Exports to mail houses
- E-mails
 - E-mail personalization
 - Broadcast email messages, campaigns
 - HTML formatted
 - Surveys
- Maintain mailing history
 - Track solicitations, acknowledgments/thank-you letters
 - Track success of solicitations

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
- 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

Reporting & Analysis

- Large selection of pre-defined reports
 - Statistical analysis
 - Solicitation analysis
 - Income analysis
 - Donor profiles
 - Campaign analysis
 - Graphical analysis (via export to graphic tool)
- Pre-designed Report Customization
 - Ability to filter report by any criteria
 - Ability to modify fields/format of report
 - Ability to modify the sort order of report
- Report/Process Filters (queries)
 - Ability to create and save custom filters
 - Select on any field or combination of fields
 - Full range of comparison criteria (=, >, contains, etc.)
- Report Sort Options
 - Ability to create and save custom sorts
 - Ability to sort on any field or combination of fields
- Custom Report Writer
 - Ability to create custom reports in a variety of formats
 - Include any fields, including user-defined fields
 - Save reports for future use
 - Sort, select and sub-total on any field
 - User-determined ranges, summaries, counts and totals
 - Use any formats, fonts, spacing, colors, images, and placement
 - Ability to print, preview on screen, or save as file
 - End-user appropriate tool or programmer's tool

Membership Management

- Track membership levels, dues, and renewal
 - Print/e-mail renewal notices
 - Manage multiple membership levels
 - 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
- Committee assignments
- 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

- Student/Alumni reports and mailings

Accounting Interface

- Interfaces to accounting application
 - QuickBooks
 - American Fundware
 - MIP
 - Great Plains
 - Others _____

Network/Multi-User Functionality

- Password controlled use by unlimited number of users
- Audit trail of user entry
- Data access defined by user rights

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
 - Hours of operation _____
 - Support department size _____

Training

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

Other Services

- Data Conversion
- Data Enhancement
 - National Change of Address (NCOA)
 - Prospect Research
 - Phone and/or email appending
- Online Support Tools
- Newsletters