



Donor Management helps you centrally record and manage the most important aspects of your donor relationships, providing a complete view of the donor from a single system.

Including all the benefits of CRM (constituent relationship management), plus added functionality to help you better manage opportunities across giving programs, Donor Management can help you achieve operational efficiency by streamlining your gift entry and management process. Easily reconcile with accounting by managing your gift information from a single location and save valuable time and resources through system generated acknowledgements and pledge reminders.

Use Donor Management's advanced reporting and analysis functionality to improve fundraising and relationship cultivation efforts by understanding what has been successful and where your opportunities for improvement are.

Kintera's integrated, on-demand open platform offers Marketing, Donor Management / CRM and Accounting solutions to help organizations reach more people, raise more money and run more efficiently.

www.kintera.com

FEATURE HIGHLIGHTS:

Donor Management Features

Letters and Acknowledgements Ensure your donors are acknowledged promptly and consistently for their donations, pledges and payments. This feature provides both single and batch acknowledgement processes to generate and record acknowledgement information for each gift. Create multiple letter templates with Microsoft Word™ inserting Sphere merge fields which provide a wide range of donor and gift information to personalize each acknowledgement.

Gift Processing Manage a broad range of gift types such as straight donations, pledges, recurring gifts, gifts of stock, real estate and in kind. You can also edit, reverse, and write-off gifts, and track lifetime giving history such as last gift amount and highest gift amount.

Development Campaign Manager The Gift Processing feature interfaces with Development Campaign Manager providing access to all campaigns. Users are able to record pledges, apply payment, and specify donor designations for one or more payments from the same donor. Additionally, users can optionally identify solicitors and matching gift opportunities; apply soft credits and memorial/tribute recognition for all gifts. Development Campaign Manager also links with other fundraising activities in Sphere, such as e-mail appeals, for complete oversight of campaigns.

Standard CRM Features

Please contact your Kintera representative for more information about our comprehensive CRM solutions.

LiquidScore Simple yet powerful wealth scoring and targeting feature.

Households Group individuals into households and manage household records.

Addresses Manage multiple sets of custom addresses for each constituent.

Salutations Select from 30 standard salutations or create custom salutations for each record.

Financials Manage purchases, gifts (single and recurring), pledges, and soft credits.

Interactions Centrally record your constituents' online and offline activities.

Relationships Manage relationships between constituents such as employer / employee. An integrated Sphere of Influence system visually displays the connections between your prospects.

Advanced Query Tool Build and save complex queries built against any field.

Segmentation Use simple folders to create and save segments and mailing lists.

Custom Fields Create and organize custom fields for constituent records.

Administrative Privileges Manage user access to specific functions or constituent data.

Special Add-on Features

CASE™ Matching Gifts Clearinghouse* Get details about the matching gift policies of your constituents' employers.

* Additional fees apply.



The Donor Management product allows you to efficiently and effectively manage a broad range of gift types.

Kintera's integrated, on-demand open platform enables organizations to quickly and easily reach more people, raise more money and run more efficiently - select the Kintera products you need, including: Events, Advocacy, E-mail, Web Site Content Management, Donor Management, Constituent Relationship Management and Accounting.

Donor Management

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| <ul style="list-style-type: none"> Letters and Acknowledgements: • Acknowledgements • Pledge Reminders • E-mail or Hard Copy Letters • Letter Templates • Microsoft Word™ & PDF Output • Track Recipients of Letters Gift Processing: • Donations | <ul style="list-style-type: none"> • Pledge Management and Recurring Gifts • Robust Payment Methods • Funds & Donor Designations • Split Gifts • Soft Credits and Memorial/Tribute • Gift Notes Development Campaign Manager: • Setup, Track & Manage Campaigns • Identify and Track Campaign Prospects | <ul style="list-style-type: none"> • Appeal Management Query Tool • Export Data Directly to CSV • Filter on 1400+ Fields and Output 100+ Fields • Access 13 Types of Data Financial Link: • Create Transaction Batches • Manage Ongoing Reconciliation with Accounting |
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Reports

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| <ul style="list-style-type: none"> • Donor Detail Listing • Gift Revenue Projection Report • Pledge Status Report • Relationship Listing Report • SYBUNT/LYBUNT Report • Solicitation Report | <ul style="list-style-type: none"> • Giving Profile History • Lifetime Giving Report • Matching Gift Status Report • Soft Credit Report • Appeal Comparison, Cost, Detail | <ul style="list-style-type: none"> Goal Summary Reports: • Fund Performance Analysis Report • Campaign Detail & Campaign • Performance Reports • Direct Mail Comparison Report • Mailing Summary Report |
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Constituent Relationships and Profiles

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| <ul style="list-style-type: none"> • Unit Types • Interactions • Constituencies Addresses: • Multiple Addresses Per Record • Standard and Custom Address Types • Effective Dates Per Address • Active and Inactive Status Salutations: • 30 Preset Salutations • Custom Salutations | <ul style="list-style-type: none"> • Salutations Data • Salutations Logic • Primary and Secondary Salutations • Batch Update Salutations Financials: • History • Payments, Gifts, Purchases • Outstanding Payments • Soft Credits • Individual and Household Level | <ul style="list-style-type: none"> Relationships: • Link Records Together • 27 Preset Relationship Types • Custom Relationship Types • Set Relationship Dates and Details Households: • Link Individuals in Households Together • Add Individuals to Household • Define Head of Household • Household-level Financial Info |
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Record Features and Types

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| <ul style="list-style-type: none"> • LiquidScore Wealth Scoring • Advanced Query • Customizable Summary Profile Page | <ul style="list-style-type: none"> • Attach Files to Records • Individual Record Types | <ul style="list-style-type: none"> • Organization Record Types • Households |
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Segmentation

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| <ul style="list-style-type: none"> • Segment Based on LiquidScore • Hierarchical Structure w/ Optional Roll-up | <ul style="list-style-type: none"> • Previous Behavior-based Segments • Activity-based Segments | <ul style="list-style-type: none"> • Demographic-based Segments • Explicit/Static Segments |
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Custom and Standard Fields

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| <ul style="list-style-type: none"> • Create, Edit, Delete, Change Order • Active or Required • Default Fields • Add Additional Custom Fields | <ul style="list-style-type: none"> Available Fields: • Standard Profile Fields (name, address, e-mail address, etc.) • Standard Event Fields (event location information, time, etc.) | <ul style="list-style-type: none"> • Custom Profile Fields • Custom Event Fields • Special Organizational Fields • Event Code Fields • Account Code Fields |
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Administration

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| <ul style="list-style-type: none"> • Functional Access Groups | <ul style="list-style-type: none"> • Virtual Accounts |
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Additional Data Management Services

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| <ul style="list-style-type: none"> • Wealth Screening™* • CASE™ Matching Gifts Clearinghouse* | <ul style="list-style-type: none"> • Address, District and Email Appending* | <ul style="list-style-type: none"> • CASS Certification* |
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* Additional fees apply.