



Kintera Sphere CRM (Constituent Relationship Management) helps you centrally record and manage the most important aspects of your relationship with your constituents. Build more complete constituent profiles with extensive standard profiles, accurate wealth scoring, custom fields, and dynamic segmentation. Automatically record both online and offline interactions for a more complete view of your interactions. Track your constituents' relationship with your organization, other members of their household, as well as other constituents in your database. Run campaigns and appeals with greater efficiency and reporting. We offer both migration and complete database integration solutions services for in house and commercial legacy systems such as GiftMaker Pro, Team Approach®, The Raiser's Edge®, and DonorPerfect™.

Kintera Sphere CRM - Member includes all of the benefits of CRM, plus additional functionality that specifically addresses the needs of membership-based organizations. Organizations can more efficiently increase their membership base and donations collected through membership dues while members have a means of securely viewing and modifying their membership profile and history. Interactive networking and community-building tools are included.

Kintera provides innovative software solutions to help organizations deliver The Giving Experience™ to donors online - including giving convenience, financial transparency, feedback about the social impact of their gifts, and a sense of belonging and appreciation.

www.kintera.com

FEATURE HIGHLIGHTS:

Member Management Features

Complete Web-based Solution – Develop a highly efficient solution for organizing and managing your members online using Kintera Sphere™ web management tools.

Membership Terms - Set specific membership type parameters such as duration (floating, fixed or lifetime), dues year, advanced sale date (to allow for pre-sales), or grace days.

Donor Member Benefits Levels – Establish different levels of membership and associate them with premiums, points, automatic discounts and other benefits. View histories of your member's benefits and edit membership terms.

Member Center – Provide a password-protected area where members can edit their personal profile, view their membership history, renew their membership, and view targeted content based on their membership level.

Reports – Centralize your membership data for comprehensive tracking and monitoring of member activities.

Member Personal Pages and Directory – Allow members to create personal pages that can be searched and viewed in the password-protected Member Directory.

Standard CRM Features

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

LiquidScore™ – Target your audience and improve direct response ROI with this simple yet accurate wealth score that's included in the CRM product.

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 Duration Type feature shown exemplifies the flexibility of the Member product. Organizations can select floating, fixed, or lifetime. Floating memberships begin the day the membership is granted; fixed membership begins and ends on a specified calendar day; and lifetime memberships do not expire.

Kintera Sphere CRM's software as a service technology platform enables organizations to quickly and easily reach more people, raise more money and run more efficiently - select the Sphere CRM products you need, including Advocate, Event Participant, Member, Prospect, Volunteer, E-Mail and Donor.

Member Management

- Customizable workflows
- Memberships can be fixed, floating or lifetime
- Unlimited user-defined membership types
- Association membership types
- Create family units
- Specify whether member receives financial aid
- Create custom membership programs
- Develop membership program categories
- Administrative access to all members
- View by individual or household
- Individual member and batch member renewal
- Renewal errors audit tool
- Historical data retention
- Member Reporting:
 - Real-time statistical dashboard
 - Create customized detail reports
 - Saved detailed reports
 - Export to Excel or CSV format
 - Advanced search query tool
 - Membership and Benefit Status Report

Constituent Relationships and Profiles

- 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
- Salutations Data
- Salutations Logic
- Primary and Secondary Salutations
- Batch Update Salutations
- Financials:
 - History
 - Payments, Gifts, Purchases
 - Outstanding Payments
 - Soft Credits
 - Individual and Household Level
- Relationships:
 - Link Records Together
 - 27 Preset Relationship Types
 - Custom Relationship Types
 - Set Relationship Dates and Details
 - Relationship Listing Report
- Households:
 - Link Individuals in Households Together
 - Add Individuals to Household
 - Define Head of Household
 - Household-level Financial Info

Record Features and Types

- LiquidScore Wealth Scoring
- Advanced Query
- Customizable Summary Profile Page
- Attach Files to Records
- Individual Record Types
- Organization Record Types
- Unit Record Types
- Household Record Types

Segmentation

- Segment Based on LiquidScore
- Hierarchical Structure w/ Optional Roll-up
- Previous Behavior-based Segments
- Activity-based Segments
- Demographic-based Segments
- Explicit/Static Segments

Data Entry Forms

- Add New Record
- Single Entry Transaction
- Batch Transaction Entry
- Delete Record
- Edit Record

Custom and Standard Fields

- Create, Edit, Delete, Change Order
- Active or Required
- Default Fields
- Add Additional Custom Fields
- Available Fields:
 - Standard Profile Fields (name, address, e-mail address, etc.)
 - Standard Event Fields (event location information, time, etc.)
 - Custom Profile Fields
- Custom Event Fields
- Special Organizational Fields
- Event Code Fields
- Account Code Fields

Administration

- Functional Access Groups
- Virtual Accounts

Additional Data Management Services

- PIN Electronic Screening®*
- CASE® Matching Gifts Clearinghouse*
- Address, District and E-mail Appending*
- CASS Certification*

* Additional fees apply.

Call toll-free 866.KINTERA (546.8372) or info@kintera.com

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