Kintera


**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 - Prospect** includes all of the benefits of CRM plus tools that enable opportunity management of prospects through a solicitation and stewardship cycle. Create custom stages to suit your fundraising cycle and custom form fields so staff can input information on opportunities at each stage. In addition volunteer tools enable effective management of staff and volunteers through the major gift campaign process.

*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:

## Prospect Management Features

Manage prospect opportunities through a solicitation cycle. A built-in robust task manager lets you set deadlines, priorities, statuses and other task information to ensure projects related to the opportunity are completed on time and with greater accountability. Set up internal automatic e-mails whenever stages are reached. Create custom stages to suit your fundraising cycles and custom form fields so staff can input opportunity information at each stage.

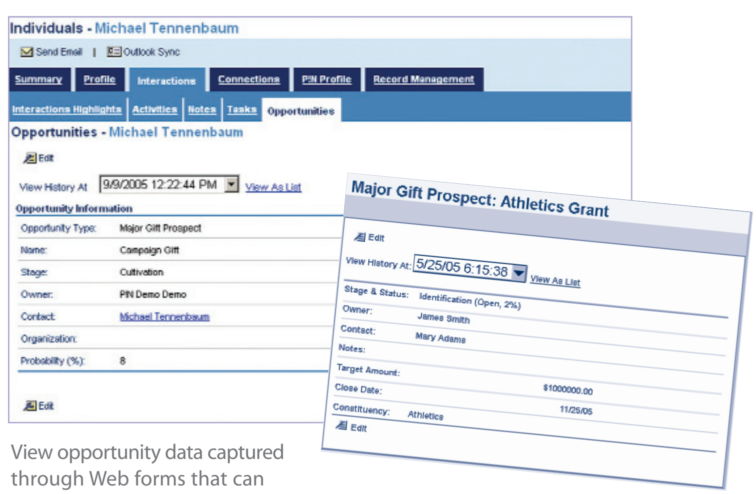
## Standard CRM Features

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.

## Additional Products

**Donor Management*** – Development Campaign Manager allows you to process gifts and manage campaigns with greater efficiency. Allow a prospect list to be selected for each campaign to coordinate gift solicitation. Assign campaign solicitors and solicitor goals. Opportunities features are linked through Development Campaign Manager enabling prospect management for identified constituents.
**CASE® Matching Gifts Clearinghouse*** – Get details about the matching gift policies of your constituents' employers.

* Additional fees apply.




View opportunity data captured through Web forms that can be customized for every stage in the solitication cycle.

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.

## Opportunities

Stages Tab: (Sets up stages for an opp type)
- Set Stage Properties and User Privileges
- Create Automatic E-mails and Tasks

Fields Tab:
- Set Default or Required Fields for Each Stage

Properties Tab:
- Define Name and Description
- Set User Privileges

Viewing / Managing Opportunities:
- View/Edit Opportunity Information
- View/Sort Opportunity History and Logs

Task Manager:
- Manage Tasks
- Manage Activities
- Manage Appointments

Development Campaign Manager*:
- Add / Delete Campaign Prospects
- Assign Campaign Solicitors
- Add / Manage Campaign Opportunities

Reports and Queries:
- P!N Profile Data
- Financial Data
- Last Touch and Next Touch Data
- Current Stage and Status
- Average Time to Close
- Donor Designations

## 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

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

* Additional fees apply.

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