



Volunteer

**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.

**Kintera Sphere CRM - Volunteer** includes all of the benefits of CRM plus tools to help you increase volunteer involvement and streamline your volunteer-related management, communications, and registration processes. Recruit new volunteers throughout the year and enhance your image and goodwill in the community. The Volunteer product is ideal for the management of both program volunteers and policy volunteers such as board members.

*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](http://www.kintera.com)

## FEATURE HIGHLIGHTS:

### Volunteer Management Features

**Volunteer Positions** – Create one-time and recurring volunteer positions. Identify the number of volunteers needed for a position.

**Online Volunteer Center** – Create searchable listings of volunteer positions available for volunteers to sign-up.

**Personalization** – Volunteers can log in to edit their profile, view recommended positions based upon their profile, view their volunteer history, and receive personalized e-mails with recommended positions.

**Centralized Volunteer Data** – Collect and manage volunteer data such as availability, skills, interests, and history as well as online and offline activities.

**Volunteer Reporting** – Volunteers can submit dates, hours, comments, and rate their experience. Staff can manage and report on detailed volunteer activity. A Volunteer Center dashboard is also included.

**Additional Fully Integrated Recruitment Tools** – Kintera CRM Relationships feature can be used to leverage your volunteers' network for recruitment purposes. The Prospect product can be used to manage the processes and workflow associated with policy (e.g. board member) volunteer recruitment.

### 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.

### Additional Products

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

\* Additional fees apply.

Easily create one-time, custom or recurring volunteer positions.

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.

## Volunteer Management – Volunteer Features

- Online Registration
- Add/Edit Interests, Skills, Availability
- Search Positions
- View Position Details
- Sign-Up for Positions
- Automatic E-mails With Recommended
- Positions
  - Time Entry Report
  - View Volunteer History

## Volunteer Management – Organization Features

- Low-touch Recruitment
- Customizable Volunteer Center Template
- Online and Offline Registration and Sign-Up
- Track and View Volunteer Profile Data
- Track and View Volunteer History Data
- Track and View Volunteer Activity Data
- Targeted Position Listings
- Volunteer Report Builder
- Volunteer Time Entry Report
- Volunteer Center Dashboard Report
- Printable Resume with Volunteer History
- Associate Volunteers with Organization Records
- Volunteer Advanced Queries:
  - Query Registrants by Event
  - Query Sign-Ups by Event
  - Query by Registration Date
  - Query by Sign-Up Date
  - Query by Position
  - Query by Hours Entered

## 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 Email Appending\*
- CASS Certification\*

\* Additional fees apply.

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