



idealware



# A Consumers Guide to Low-Cost Donor Management Systems

February 2017

Second Edition

## How Was This Report Funded?

This report is the result of a partnership between Idealware and NTEN, the Nonprofit Technology Network. Idealware was responsible for all of the research and editorial content of this report, which was created without the review of those who funded it. The vendors of systems included in this report do not pay for inclusion, nor does Idealware accept any funding from vendors at any time. Neither the funder nor the vendors had any input over the editorial content of this report.

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# FOREWORD

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The 2017 *Consumers Guide to Low-Cost Donor Management Systems* is here. On behalf of NTEN: The Nonprofit Technology Network, I am pleased to share this updated report with you.

NTEN aspires to a world where all nonprofit organizations use technology skillfully and confidently to meet community needs and fulfill their missions.

We are the membership organization of nonprofit technology professionals and we believe that technology allows nonprofits to work with greater social impact. We enable our members to strategically use technology to make the world a better, just, and equitable place.

NTEN hosts the annual Nonprofit Technology Conference, manages the Nonprofit Technology Professional Certificate, and connects nonprofit professionals with resources, professional development, and their peers. NTEN members represent organizations of all sizes with the shared knowledge that technology can help us be more effective and efficient.

This is the third time NTEN: The Nonprofit Technology Network and Idealware have partnered to give you an apples-to-apples comparison that you can use to make an informed decision about what's best for your organization. I'm pleased to share the report with you and hope it serves you and your team in selecting the tools that are right for your organization.

Sincerely,

Amy Sample Ward  
C.E.O.

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A man with a beard, wearing a red and white swim cap and blue goggles, is sitting on the edge of a swimming pool. He is holding a black smartphone in his right hand and looking at it. The water is clear blue, and a yellow rubber duck is floating nearby. The background shows the pool's edge and some foliage reflected in the water.

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# **CONSUMERS GUIDE TO LOW-COST DONOR MANAGEMENT SYSTEMS**

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# INTRODUCTION

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Donors are the lifeblood of nonprofit organizations. You need them to survive. But how do you manage all the details about their giving along with all the personal details that are key to maintaining successful relationships without breaking your bank? This report looks at a number of low-cost donor management systems designed to do exactly that.

A donor management system is sometimes called a fundraising system or a donor database. At its most basic level, it's a system that manages information about donors and gifts so you can understand how much you've raised, keep track of all the useful information you know about your donors, manage mailings, emails and campaigns, and print reports on all this information.

There are a huge number of systems available, ranging from the basic to those that offer all sorts of additional features and functionality. Costs vary as well—you'll even find systems for very limited budgets. There are so many systems, in fact, that the challenge is not so much to find one that might work but to understand which one is likely to be the best fit for your needs.

This report is targeted at small-to-medium-sized nonprofits for whom fundraising is a priority. The systems it covers can be suited to a wide range of organizations, from the smallest just getting started all the way up to those with a staff of around five fundraisers. If your staff is larger—especially if you're doing complex work in a number of different fundraising areas—you may well want to look to the more powerful (and more expensive) systems not covered here.

To better fit our audience, we targeted systems that cost under \$6,000 to support one user and fewer than 1,000 records for the first year. This range still encompasses a huge variety of systems. Some cost only a few hundred dollars, while others just met the \$6,000 cutoff; some were very full-featured, while others were stripped down and simple. In all, we demoed 35 systems.

The first step in choosing a software tool, of course, is understanding your own needs. To help, we provide a look at the different types of systems available and what they typically do to help you get a sense of what to look for overall.

We then dive in for a closer look at some of the systems from the group that we recommend to meet common nonprofit needs. Because nearly all of the systems we reviewed are useful in at least some situations, we defined a set of scenarios that cover a number of typical situations likely to apply to nonprofits and recommended the best systems, in our opinion, for each. Note that you may find one or more scenarios that apply to your organization's own needs. Once you've narrowed down the field that way, you can cross-reference these recommendations against the *Index of Low-Cost Donor Management Systems*, which gives more detailed descriptions of each, starting on page 32.

Finally, we take a more detailed look at 11 of the systems that, to our minds, had the best combination of functionality, price, and appeal for a number of common nonprofit needs—this is our “Best Value Shortlist.” For each of these, we conducted longer demos to allow us to provide an apples-to-apples comparison of features to help you understand their differences and strengths, and to better determine which might work for you.

There are a lot of good products in this market space, and there's a lot of information about them in this report. Keep your own needs and processes in mind as you read through it. By the time you've finished, you'll be armed with everything you need to know to start finding the right donor management system for your organization.

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# WHAT HAS CHANGED IN THIS REPORT?

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The donor management landscape has changed since 2013, and we've updated this report to reflect those changes—both in terms of systems we reviewed, and how we reviewed them. We improved our evaluation criteria by adding a number of new considerations, such as mobile access to the systems, access for donors to update recurring payments online, reporting dashboards, tracking social media information, and much more.

For this edition, we also introduced a number of new systems, including the following:

- **@EASE**, by Batsch Group Inc.
- **Bloomerang**, by Bloomerang
- **EveryAction**, by NGP VAN
- **Exceed Beyond**, by Telosa Software
- **Kindful**, by Kindful
- **Network for Good**, by Network for Good
- **NPOconnect**, by YourCause (formerly Orange Leap)
- **Salsa CRM**, by Salsa Labs
- **The Raiser's Edge NXT**, by Blackbaud

To cast a wider net in the marketplace while still keeping to a manageable number of systems, and to ensure that we were fair to systems with a focus beyond donor management, we excluded those that cater primarily to membership organizations, churches, or

synagogues—specifically, systems with fewer than 100 clients exclusive of those audiences—as we can't do justice in this report to the features of systems geared toward those needs.

In practice, this means we dropped some systems included in the last version of this report, including:

- **Affinaquest**, by Affinaquest, as it has fewer than 100 clients in the United States.
- **Community Enterprise**, by CitySoft, Inc., as the vendor reports fewer than 100 clients exclusive of membership organizations, churches, or synagogues.
- **Click & Pledge**, by Click & Pledge, as the vendor never completed the initial vendor survey required for inclusion in the report despite numerous attempts to contact them.
- **Exceed! Basic**, by Telosa Software, as we limited the number of systems for our consideration in this report to no more than two per vendor.
- **eDenari**, by Denari Software, as it has fewer than 100 clients in the United States.
- **GiftWorks**, by FrontStream Payments, as the vendor never completed the initial vendor survey required for inclusion in the report despite numerous attempts to contact them.
- **PatronManager**, by Patron Technologies, as the vendor declined to participate.
- **The Raiser's Edge (i)**, by Blackbaud, the first-year costs exceeded the \$6,000 limit for consideration.

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# WHAT TYPES OF SYSTEMS ARE AVAILABLE?

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As you start to consider your options, think through the high-level options before delving into the detail of features.

## Do You Need a Donor Management System?

First off, do you need a donor management system at all? Chances are, you do. If you're receiving more than a handful of individual donations, you'll quickly run into problems with lesser solutions. For example, a tool like Microsoft Excel can't usefully link pieces of information together, so as soon as someone gives more than once, you have a tracking problem. If you have 10 donors who have each given between one and five times, the spreadsheet becomes complicated and ugly, making it difficult to figure out your total giving for the year. Add in the fact that two of those donors are married and should only get one mailing, and it's suddenly completely unmanageable.

A number of donor management systems cost just a few hundred dollars or less, so you can likely find something within your reach. With all the information a system will put within your reach, you may well be able to bring in a bit more money to cover the cost.

## Tracking Donors vs. All Constituents

Some of the systems we'll talk about are built specifically to track donors, and have little functionality to support event attendees, volunteers, members, or other constituents. But more and more systems provide functionality to track all these different kinds of constituents in one place. This type of system is often called a Constituent Relationship Management system, or a CRM. CRM isn't as much a classification of system as it is a philosophy—if you can track all

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**You might want your donor management system to also function as a CRM by integrating all your data to provide a central view.**

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constituent data in one system, that system functions as a CRM for you. But what works for you might fall short for another organization if it has a number of important interactions that aren't supported.

You might want your donor management system to also function as a CRM by integrating all your data to provide a central view, which is certainly a goal worth considering. In that case, it's important to look at all your organization's constituents and all the ways they interact with you; then, evaluate systems based on that view. It's unlikely that any system will support all of the interactions and constituents of a sizable organization out of the box, but many systems are configurable enough to let you build in reasonable support.

## Hosted vs. Installed Systems

A growing number of donor management systems are hosted entirely online, and accessible via a web browser. In this model, sometimes called Software-as-a-Service (SaaS), or using an application "in the Cloud," you pay a software vendor to provide online access to the software. The software and all your data is stored on the vendor's servers. You don't have to purchase any



hardware, the vendor handles software updates and data backups, and your staff can access the system from anywhere there's an internet connection.

This model is quite secure—many banks and hospitals with far greater security needs rely on similar models. Online systems also frequently have stronger support for other online processes, like emailing donors or integrating with your website. You typically pay a monthly or yearly “rent” for the system, which can range from a few hundred dollars per year on up.

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## With any installed system, you'll be responsible for software updates and data backups.

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As a more traditional option, some donor management systems are purchased up front and installed onto your network and your staff's computers. Many of these systems are based on the Microsoft Windows operating system, so if your organization uses Macs or another OS, you may have a difficult time finding a compatible installed system. A few of these systems require a dedicated server—literally, a computer that does nothing but run the software—if you'll have multiple users. Make sure to determine this up front so you can factor that into the cost of the system. With any installed system, you'll be responsible for software updates and data backups, though some vendors will help you with this for free as part of their support service.

Installed system vendors typically charge a “license” fee to buy the system, which is often based on the number of staff members (also called “users,” “seats,” or “licenses”) you'll have using the system. After you pay the license fee, you typically are not committed to paying anything else, but most offer service and

the ability to get free updates to the system (such as new software releases with improved functionality) for a continuing annual fee. This annual fee, generally somewhere between 5 percent and 25 percent of the initial cost, is usually called a “maintenance fee.”

A few of the vendors who provide installed systems also offer a version of their software that can be accessed online through the use of such remote access technologies as Windows Terminal Server or Citrix Server. This model essentially transforms a system which is traditionally installed into an online hosted model.

## Custom-Built Systems

What about building your own system out of Access or Filemaker, or some other technology? Fair warning—it's very unlikely such a solution would make sense to support donor management needs. Donor management processes are much studied and well-understood, and lots of systems have been built to support them, many of which are very configurable. Building your system means you'll be the only organization using it; you won't have any community to discuss issues with, or anyone to provide training. You'll not only need to pay to create the system initially, but to maintain it, and you'll never get any upgrades that you don't pay to build yourself.

If you have needs or processes unique to your organization, you're probably better off starting with an existing system and customizing it, even extensively, if necessary. Existing systems will have basic functionality—like integrated mail-merging, emailing and standard reports—that would take you days or weeks to build yourself. Look for an extensively customizable system, like a CRM platform (there's a scenario specifically devoted to that in our Recommendations section), and start there. Tools like Salesforce allow for a large amount of customization without requiring a large amount of technical skills—and several systems we reviewed are actually built on top of that platform already. Or, consider that your processes may be unnecessarily unique. You may be better off changing your processes to meet standard best practices that existing systems are already designed to support.

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# WHAT DO THESE SYSTEMS DO?

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As you assess your own needs, it can be very helpful to understand the typical features and functions that are available, and how they compare from more basic to more advanced systems.

## Adding and Tracking Donations

No donor management system would be effective without the ability to easily enter donations. But the systems vary a lot in terms of capabilities in this area, from very basic to sophisticated, so there's a lot to consider.

Among your first concerns is the ease with which you're able to enter gifts into the database. Can you easily search on important fields to see if the donor is already in the database to prevent adding another record for the same one—called a duplicate? Can you easily enter a lot of gifts in one sitting through a quick entry form, ideally, or an upload file?

As you consider the ease of adding gifts, also consider your own process—especially when it comes to reconciling gifts with your accounting system. Some systems require that all gifts be entered as part of a batch (a grouping of gifts for a particular time frame that can be transferred as a single entity to your accounting system). In these systems, entering one-off gifts may be a little more complicated or time-consuming. Other systems offer little support for batches, which can be a problem if you're used to reconciling that way. Some systems offer a middle ground—like defining batches for gifts you've already entered. The trick is to make sure the system jibes with your process.

The systems also vary in their support for types of gifts. Most support pledges, and let you log when donors promise gifts, but they don't all make it easy to create a pledge schedule, modify it to suit your needs,

or to then log gifts against those pledges when the gift is made. Does the system alert you to outstanding pledges, or do you need to track them down yourself?

Consider how the system deals with other gift types. Can you log gifts from a company as opposed to individuals, and separate them out in reporting? Does the system support gifts “in honor of” someone, tribute gifts, stock gifts, in-kind gifts (perhaps entered as a zero dollar donation)? Most systems claim to support each of these things, but their actual functionality varies widely. Every organization's needs differ. Define what you really need to track for each of these gift types, and see what each system offers for your specific needs.

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## Define what you really need to track for each gift type and see what each system offers for your specific needs.

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All systems let you track things like the amount and date of a gift, but can you easily track the gift by a campaign, fund or source, or split the gift in order to associate each piece with different ones? Can you log a “soft credit” for gifts that someone else in the database—say a board member—helped to bring in? Can you enter free-form notes to refer to later? Can you track that part of their gift isn't tax deductible, because they received a “premium” (a thank you gift, like a T-shirt, that has value)? Make sure the system lets you log and track the gift information that's important to your organization.

## Managing Donor Information

You can't have gifts without donors, and you can't have a successful donor management system without the ability to easily see and maintain up-to-date donor information. Just logging donors isn't enough to make the most of these relationships.

Can you store all the phone numbers and addresses you need, including seasonal addresses (so mailings follow them to summer or winter homes)? Can you clearly mark when someone should not be contacted at all? What if your donors are on Facebook, Twitter, or other social media? Can you view their status or tweets or message them from within the system? At the very least, can you keep track of what social networks they use?

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## To grasp how a system manages relationships, look at how it handles "householding," or tracking multiple people who live together.

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To grasp how a system manages relationships, look at how it handles "householding"—tracking multiple people (like a husband and wife) who live together. Some systems make it easy to track information about two different people, but send them combined mailings. Others group all the people in a household into a single record and manage them all together, or let you link separate records to indicate relationships. And some provide only marginally effective (and often complicated) workarounds for householding, such as requiring you to mark one member of the couple as "Do not mail."

It can also be useful to track other relationships between different donors—for example, siblings or coworkers. Can you track a company or organization,

and see the people that work for it? What about your own relationship with donors? Can your staff log all calls and contacts with donors so staff can easily see a full history? It's also useful to track which staff members know which donors—at least the primary staff member who owns the relationship, if not all staff members with connections.

When a donor calls, can you quickly see their involvement, their giving history, where you got their name, and your record of communicating with them? Do you need to leave the system to access documents related to a donor, or can you attach them directly to the donor record for easy viewing? Is this information well-organized and easy to access, or do you need to look in 10 different places just to figure out whether you've talked to them before? Can you easily access it via a smart phone or mobile application?

Information is dynamic. What happens when a donor moves to a new address, changes her phone, or gets a new job? Some systems integrate with outside sources of address and other demographic information to help you keep your donor data as up to date as possible. Unfortunately, donors also die. Systems account for this in myriad ways, ranging from a simple check box to mark a donor as "deceased," all the way through wizards that walk you through a checklist of all the areas in the system a donor's death might affect.

These systems tend to track a lot of information about each donor. How they manage and summarize that information can be an important differentiator that makes or breaks a system's usefulness to your organization.

## Prospecting and Proposals

In addition to tracking donors, many organizations want to use all this tracking data to proactively manage fundraising. In some cases, you might want to do this across different members of the development staff (the people who do the actual fundraising). The systems we reviewed vary widely in their support for this functionality.

Most systems let you assign a status or priority (or both) to each donor. This helps you understand how they fit in with your fundraising action plan—for

instance, whether they're a "sure thing" you should spend a lot of time soliciting, a "lapsed" donor you need to rethink your approach to, or an "unlikely" donor not worth much effort—and then use that information in queries and reports. Many systems will also let you track which staff member is responsible for relationships. These seemingly straightforward fields can be very useful—for example, each staff member could easily generate a list of major donors they should call.

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## Some more advanced systems let you set up complex prospect workflows that define sequential stages and track your donors through them.

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Some more advanced systems go a step further and let you set up complex prospect workflows that define sequential stages and track your donors through them. These workflows can help organize the most appropriate solicitor action for different prospecting stages. Some systems offer sophisticated support for different stages out-of-the-box, while others let you flexibly set up your own workflows. Some let you track dollar amounts for ongoing solicitations and then see a fundraising pipeline forecast. It can also be handy to be able to schedule "ticklers," or reminders, for yourself or others to do something or call someone on a certain date, or even have the system notify you based on certain thresholds reached or changes in the data. For example, a system might allow you to set up action reminders to staff when a donor reaches \$10,000 in annual gifts.

These workflow features are also useful to track grant proposals. Many systems that support this more advanced functionality flesh it out with specific fields to track upcoming proposal deadlines, grant history, and the types of areas certain foundations are interested in.

## Permissions

It's also important to think through the division of labor across fundraising tasks, which can translate to different roles in the system. Systems have different levels of support for this functionality. Some let you turn features or fields off for certain users to hide or protect system data, or to provide a more streamlined experience. Others provide the same level of access to everyone. A few don't support multiple users at all. The more sophisticated systems provide a menu of system functionality and let you define read, update, and delete rights for each module. A few offer even more detailed control and let you define rights for each individual data field.

## Mail-Merging Letters

A good donor management system should make it easy to create printed materials, including thank you letters for each gift, solicitation letters, labels, and more.

Some systems provide seamless letter creation and mail-merging with built in word processors. Others integrate with Microsoft Word to let you easily mail-merge into predefined Word templates. Some, though, require you to export data into Microsoft Excel and mail-merge from there.

More advanced systems provide specialized functionality to manage thank you letters—for instance, they'll let you choose a letter template when entering a gift and then run off the right letters in one shot, with labels to match—but check their support for generating one-off thank you letters, as well. Some systems make you create every letter as part of a batch process, which is less than ideal if you frequently enter and acknowledge one gift at a time.



Most systems let you create your own letter templates, which can include personalized text, mail-merged data, and custom formats, fonts, and logos. More advanced systems let you merge in conditional text (for example, to include a special greeting to donors who attended a recent event) or custom gift strings (for instance, to solicit 15 percent more from each donor than they gave last year).

Nearly every system will let you use a querying tool to define the group of donors for whom you'd like to print letters, and then create the letters (see the section of this report on querying for more detailed considerations). It can then be useful to be able to review and tweak each individual letter before it is printed—for example, to add a personal note for a specific donor.

It's also important to consider how the system logs the letter into a donor's profile once it's been mailed. Is it logged automatically, or do you need to go through one or more extra steps to log it?

## Emailing

Email can be a fast, effective, and inexpensive way to reach out to constituents. Most systems at least support individual email by storing addresses and letting you send email by clicking on contacts. More and more, however, let you email an entire group at once—for example, to send information about an upcoming event to all donors who have given a particular amount of money.

Some of the more sophisticated systems provide comprehensive broadcast email support, often through substantial integration with specialist tools like Constant Contact or Mail Chimp. Check to see if they support graphical emails or templates. Can you mail-merge donors' names into the emails? What about more complex data like gift strings (formulas that ask a donor to give, for instance, 15 percent more than their last gift)? Can you schedule an email to be sent in the future? Can you see reports of how many recipients opened or clicked through on your email?

It's important to check how emails will be sent. Some systems use your organization's email server. This works fine for individual emails or emails to a few dozen people, but is risky if you email thousands of people.

In general, Idealware recommends sending broadcast emails through vendors' servers, which would mean either choosing a system that allows that or opting for a third-party broadcast email tool instead.

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## For systems that rely on a third-party broadcast email client, it's also important to consider how well email is integrated.

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For systems that rely on a third-party broadcast email client, it's also important to consider how well email is integrated. In addition to letting you send a list of donors to be contacted from the system to your email client, does it allow you to import delivery statistics—including which emails were opened and which could not be delivered—back into the system, or mark which donors received which emails? When a donor unsubscribes from future emails, will the integration allow that information to update the donor's record? Or do you need to manually mark which donors should not be emailed?

## Querying

Any system should let you generate useful lists of donors and potential donors based on different fields. There are three major components to querying: the ease with which nontechnical staff members can create queries, the flexibility with which you can create the queries you need, and what you can do with the lists once you've generated them.

The first two components are nearly opposites of each other. It's difficult to build a flexible querying tool that's also easy to use. Some are easy but limit your options, while others are powerful but require sophisticated knowledge of databases and querying language

to use them effectively. Some advanced systems do, in fact, succeed relatively well in both areas, though, with flexible querying that is not prohibitive for nontechnical users. Several systems in this report now allow you to view the results of their queries as you set up the conditions, and as you add or refine your query, this list will update dynamically, allowing you make sure that you have the right list you need.

As for the third, check to see if you can save queries, or if you can refine saved queries after you've generated a list—and how easy it is to do so. With any tool, make sure you take a look at the querying functionality to judge how well it will meet your needs. Once you generate a list of donors, most systems will let you export them into a file, or make updates across the whole group. Often, this is also where you start to generate mail-merged letters or emails. Some systems merge querying functionality with reporting and ask you to start your reporting process at the same time.

## Reporting

Unlike queries, reports are typically formatted. They may also include different categories, subtotals, or other informational summaries about anything from fundraising totals by month to comparative statistics for your various campaigns. Most systems come with a number of prepackaged reports, often called “standard” or “canned” reports. These canned reports vary quite a bit in usefulness among the different systems.

Think about what reports your organization needs, and which you'll regularly use. Comparing fundraising totals over time is common, but what about comparing campaigns to one other, comparing demographic groups, or reporting on your pledge pipeline?

You should also define what “gifts” means to you—for example, whether they include in-kind donations—and make sure the reports support that definition. Rather than comparing the systems' reporting capabilities against each other, evaluate them against your own needs. A system that offers hundreds of standard reports that don't apply to your work is no better than one with just a dozen reports that provides everything you need.

From time to time you may want to create your own custom reports. For simple ad hoc reports, it might suffice to be able to export this data to Excel and

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# A system that offers hundreds of standard reports that don't apply to your work is no better than one with just a dozen reports that provides everything you need.

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format it there. But for more complex reports, some systems provide a set of tools that let you define the data you'd like to see, as well as the columns and formatting included in the report. These tools range from the basic, which allow only limited support for customizing reports, to the expansive, which are limited only by your ability to apply them—reporting tools are often complex, and can be confusing to users without experience managing databases. Make sure you have access to all the data that might be useful, including any custom fields you've defined. Some tools will even allow you to add charts or graphs based on your data.

Look carefully at each system's features to judge whether someone on your staff will be able to effectively create reports. Make sure you can save a report format once you've invested time in creating it, and then easily find it again, whether through a “favorites” report list or by pulling the report into a frequently used “dashboard” page.

Most systems now provide some type of “dashboard” interface to display and access frequently used reports, graphs, or charts showing important metrics about your fundraising performance. For some lighter-weight systems, the dashboard may be pre-configured with particular reports, charts, or tasklists, and users may have some ability to hide particular items that aren't relevant to their work. More robust systems may allow users to fully tailor the dashboard to their

needs by adding desired standard or custom reports or new charts or graphs. A few systems even allow you to set up specific dashboards by user role, letting you have different information displayed for a major gift solicitor and your executive director, for example.

## Payment and Website Integration

Donor tracking doesn't exist in a vacuum. As part of your regular donation management procedures, you might also want to accept credit card payments through your system, or integrate the system with your website. The systems we tested vary greatly in whether—and how well—they support these needs.

At the most basic level, check to see if the system even supports processing payments. Can you hook it up to a merchant account—basically, a bank account to collect credit card payments—to charge people's cards? Can you set up an automatic process for charging cards on a recurring basis? If you'll be storing donor credit card numbers in the system, or through the vendor, make sure there are strict precautions to protect those numbers. At the very least, numbers need to be encrypted at all times. Ideally, vendors store them on a computer that is not connected to the internet most of the time.

Some of the systems also support online payments. If so, what kinds of payment forms can you set up—just online donations, or recurring donations, event registrations, membership dues, or item sales (which typically require online “shopping carts”)? A few systems support distributed fundraising—also called team or peer-to-peer fundraising—with features that let supporters set up their own fundraising pages. Or can you set up a website sign-up form that doesn't require payment, like an eNewsletter subscription, for example? Can donors manage their own contact and other information from a donor portal?

For any of these, how much can you customize the payment forms to match the colors, style, and navigation of your website?

Another thing to look into is the transaction fees you'll be required to pay for any credit card processing—you'll almost always have to pay something. Fees can range from a minimum of about 1.5 percent all the way up to a whopping seven percent or more.

A few systems use payment processors that charge a monthly rate rather than transaction fees—which could potentially be cheaper in the long run if your organization sees a high volume of online donations. For some systems, the vendor provides a payment processing tool of their own, while for most systems, you can choose which processor to use, allowing you to shop around for the lowest fees or keep the payment processor your organization already uses.

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## Another thing to look into is the transaction fees you'll be required to pay for any credit card processing—you'll almost always have to pay something.

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Finally, what happens if someone asks for a refund? Many systems will require you to use a different interface to make a refund, and then log the refund separately into the system.

## Tracking Other Interactions

Donors are not your organization's only constituents—you may also have volunteers, members, program participants, event attendees, or a wide variety of other people you work with. Chances are, you interact with many of these people in different ways. For example, one person might not just be a donor, but also a volunteer for your food pantry and a youth mentor. It's important to think through your approach to seeing a full picture of all your interactions with each person.

Many organizations rely on events for fundraising, constituent engagement, outreach, and more. It's a lot of work organizing and running such events, and it can be helpful if your system supports them—for

example, by recording RSVPs and attendance, recording basic information like meal preferences, printing out attendee lists, taking event payments, or even selling assigned seats for a performance.

For galas or dinners, you might also want to be able to track guests against paying attendees, table assignments, or the amount of money raised per table. For workshops or conferences, it's more important to be able to track registration for different sessions, or to easily generate name tags. Consider what event planning needs your organization is likely to encounter, and make sure the system will support them.

In addition, many of these systems help to manage volunteers—for instance, to track their interests so you can match them with appropriate opportunities, and then track the hours that they put in. Some also provide functionality to track member levels, payments, and expiration dates. Some, in fact, support many different types of interactions, or provide functionality that lets you flexibly build support for your own custom types of interactions.

While some systems offer add-on modules that can provide these functionalities (at additional cost), some are fully-fledged constituent relationship management (CRM) systems. These tools provide a 360-degree view of all your constituents, and tend to be highly customizable. As a result, they tend to not be as strong in tracking any individual donor type (jack of all trades, master of none), and may require more setup than a dedicated donor database—those included in this report are typically built on top of common CRM platforms (like Force.com from Salesforce) and designed with donor management in mind.

## Customization

Most donor management systems are designed to work for a wide variety of organizations. To facilitate this, they let you configure many of the field values throughout the system—for example, you can define the types of relationships your organization has with constituents, and those choices show up in dropdown boxes throughout the system.

But few systems let you move, remove, or change the names of the default fields that come with them, and they vary substantially in their ability to let

you add new fields. Some permit very little in this area—either you can't add any new fields, or only a specific limited number. Others allow unlimited new fields, or even let you customize further to allow unique-to-your-organization constituent interactions. Check to see where your new fields will be displayed in the interface—often, they must go into a limited “custom field” area which can become disorganized and awkward if you add a number of fields.

A few systems can be almost completely customized to your needs—either by you or the vendor—with custom fields, labels, interfaces, processes, and functionality. For instance, an open source system lets you access the underlying source code, so an experienced programmer can make changes. This type of wholesale customization can be useful for organizations with unique needs, but it can be expensive to set up and more difficult to support down the road. Make sure the processes you're trying to support are actually unique, and it's important that they're unique. It might be more effective to change your process than to customize a system around it.

## Integration

In many cases, you'll want your donor management system to be able to easily communicate with other systems—for instance, to be able to upload a file of everyone who filled out an online survey, or to dump the list of participants to whom your mailing house should send a catalog.

Whether your system is hosted (Software-As-a-Service) or installed, the donor data contained within it is yours. Being able to extract that data from the system is critical in order to back it up (always a good idea) or migrate it to a new system. Almost all of these systems allow you to freely export data, but it doesn't hurt to be sure. Most also allow you to easily import, but check if there are additional costs to do so.

If you're planning to frequently sync up the data between this system and another, manual imports and exports can be time-consuming and error-prone. It could be worth instead investing in hiring a programmer to build an automated connection so data flows from one system to the next without manual intervention.



If you want to build an automated connection, check to make sure the system supports it. Is an API provided so your own programmer can access the data? What data can be accessed this way? Is it read-only, or can you write to the database? Check to see if the vendor has to set up integration with external packages for you—often, this process means an extra cost. Some systems offer an app store: a searchable set of apps, modules, or extensions built by third-party vendors that work with the database.

## Accounting Support

Because donor management systems track incoming money, it's critical to be able to easily sync them with your accounting system. When considering this, look for two different things—first, what controls and support are provided to make it easy to reconcile donations with your accounting system? Second, what kind of support does it offer for actually communicating with your accounting system?

Many systems (although certainly not all) support the idea of a “batch” of donations—a set of payments for a particular time frame that's grouped and considered as one for accounting purposes. Sometimes you'll need to enter gifts into a batch, or sometimes you can create the batch afterwards by grouping existing gifts. Once a batch is closed, a few systems let you mark it as “posted” or reconciled to accounting for tracking purposes.

But the systems vary in how they approach making changes to a payment after the batch it's assigned to has been reconciled. Many systems offer no controls to prevent someone from changing a donation after the fact, which could throw your books out of whack. Others offer the opposite extreme—there's no way to make any change to a payment once it's been reconciled. The best approach may fall somewhere in-between—for instance, the ability to un-post and then re-post batches.

Having a donor management system that speaks directly to your accounting system can come in handy. A number that we reviewed offer direct feeds to such common accounting systems as QuickBooks. But a system that handles batching well is usually sufficient—as long as you define a straightforward

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# Having a donor management system that speaks directly to your accounting system can come in handy.

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batching strategy, it's not typically difficult to manually export batch information from your system and import it into your accounting system on a regular basis. In fact, some organizations prefer the control that process allows compared to an automated process.

## Ease of Use

Most donor management systems are complex enough that your staff—especially those less comfortable with technology—will benefit more if they're given training. However, functionality should be relatively easy to learn and remember.

Are fields and functions intuitively named and easy to find? If staff need cheat sheets or guesswork to run basic processes, they're more likely to opt out of using the system or resort to workarounds.

Systems should also effectively support power users—often, these users are development staff members who spend hours each day in the system. Being able to quickly add gifts, find information, and run the right queries and reports can make a big difference in their efficiency.

Pay attention both to how the system looks and to how it works. Does the design help you see important information? Font selection and size, graphics, and blank space all work to make a page easy—or difficult!—to read. (If you're not sure how well a design works, take a step back from your screen. You should be able to still see the most important information from that distance.) The order of steps to follow also matters. Do you select a set of constituents, then

choose an action? Or do you choose an action first, then select the set of constituents? Either can work, but make sure the system makes the order clear—and that the order fits the way you prefer to work.

## Support and Training

Whatever else you need in a donor management system, at some point you're likely to need customer support. Virtually all reviewed vendors offered solid, basic-level support—phone support, system documentation, and (at the very least) informal training upon request.

In terms of phone support, the difference is likely to be price and quality. How much do you have to pay per incident, or per year? Can existing customers typically reach someone knowledgeable when they call for support?

Good documentation, either printed or online, is also critical. Ideally, information should be available when you need it within the system—for example, to let you see what clicking a button will do before you actually click it. But printed manuals are also useful. If you're going to widely roll out a system, can you tailor the documentation to your own processes?

Training varies among vendors, from affordable over-the-phone and online options to more formal on-site training at your office. Do they offer training materials? How much will you pay for each training option?

## Installation and Maintenance

What must you do internally to support and maintain the system? Hosted systems are typically easier to support, but check how easy it is to back up data so you have your own copy. Ideally, the system should provide an automated backup utility that saves your data somewhere other than the vendor's servers. A system that offers the ability to export a snapshot of your data on a specific date—such as at fiscal year-end—is also useful.

If the system is installed on your own desktops, you'll need to take charge of the installation process and back up your data (though the vendor may help you through the process). A few of these systems have fairly complicated infrastructural needs—make sure you know, for instance, whether you'll need a dedicated server (a computer that literally does nothing but run the donor management system). For any installed system, you'll need to add in any system updates, so it's worth checking how often they're issued and what you'll be expected to do to install them.

## Product Background

It takes considerable effort to choose a donor management software package and move your data into it. You don't want to be forced to repeat the process in a year because the vendor went out of business.

When considering a system, consider the vendor, too. Ask some background questions—how long have they been in business? How many clients do they have, and how many staff members? Does the revenue earned from their system cover the personnel and operational expenses required to support it?

Most of the systems we include in this report have hundreds or thousands of clients. A vendor with a few hundred clients whose revenue covers expenses is likely to be as stable as any other company. Take your own preferences into account when thinking about company size. A small company might provide a more personal feel in their service, while a larger one might have more defined processes around upgrades and issues.

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# RECOMMENDATIONS BY USE CASE

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Which of the 32 systems we reviewed are the best? That turns out to be a very complicated question. Each system has its particular strengths, and we could think of a scenario for which almost every one we reviewed would make the most sense. That's great news for organizations looking for a system that meets a specific set of needs, but it makes it very complicated to try to understand the market and sift through the options.

But of course, not every system is right for every non-profit. To help you determine which best meets your needs, we defined a set of scenarios that cover a number of different typical nonprofit scenarios and recommended the best systems, in our opinion, for each.

Each system may be appropriate for more than one scenario. And more than one scenario might fit your own organization's situation. Look through them all to find the ones that most resonate for you.

Note that all these scenarios assume that you need solid donor management functionality—for instance, that you need to track pledges or advanced gift types and easily generate printed thank you letters. And throughout the report, we're focusing on systems that cost less than \$6,000 in the first year. If your budget or needs differ—for example, if you're looking for a system that tightly integrates with your website, and you don't need any substantial fundraising functionality—you'll find many other systems that might meet your needs as well or better than those recommended here.

Once you're armed with a list of recommended systems that may best fit your needs, flip to our *Index of Donor Management Systems* beginning on page 31 to learn more about them. You'll also find a more-detailed look at our Best Value Shortlist, the 11 systems that, for us, offer the best combination of functionality, price, and attractiveness in a variety of situations. We compare those systems beginning on page 26.

Ready to dive in?

## You just need the basics...

You don't need to manage a lot of donors or a complex fundraising process—you just need something simple, easy, and functional. You have some donors and do a little soliciting but don't spend much time fundraising, and don't expect it ever to be a huge part of what you do. Events aren't a big part of your fundraising strategy, and you don't plan to move people through any specific prospecting process. You only have one or two users, less than a few thousand donors, and you want to pay as little as possible.

- **Akubo CRM**, by Akubo Software, Inc.
- **BasicFunder Premier**, by Jellyware Corporation
- **DONATION**, by Software4Nonprofits
- **FundRaiser Select**, by FundRaiser Software
- **ResultsPlus**, by Metafile

## You're a tiny but growing organization, and price is critical...

Money is tight, but you want a solid fundraising base that will last as your efforts get more sophisticated. Only one or two people will use the system. You don't have a lot of donors yet, but you're actively fundraising and expect more.

- **DonorSnap**, by DonorSnap
- **FastFund Raising Online**, by Araize
- **Fundly CRM**, by NonProfitEasy
- **Little Green Light**, by Little Green Light, LLC
- **Nonprofit Manager**, by Trail Blazer
- **Sumac**, by Sumac

## You need something easy to set up and use...

You don't have any techies on staff and you want to focus on fundraising, not on technical or configuration matters. You want a solid fundraising system, and price is a factor, but your priority is a low-maintenance system that won't require a lot of training.

- **Bloomerang**, by Bloomerang
- **DonorPerfect**, by SofterWare
- **Donor Tools**, by Higher Pixels
- **Kindful**, by Kindful
- **Little Green Light**, by Little Green Light, LLC
- **MatchMaker FundRaising Software Enterprise Edition**, by Heritage Designs, LLC
- **NeonCRM**, by Z2 Systems
- **Network for Good**, by Network for Good

## Fundraising events are a critical part of your process...

You want a donor management system that tracks who comes to your galas, who your table champions are, and how much the event raised. You need a system with solid out-of-the-box support for both fundraising- and events-management; the ability to let people RSVP or buy tickets online would be a big plus.

- **Exceed Beyond**, by Telosa Software
- **Total Info**, by Easy-Ware

## You're pretty tech savvy, and you want a free system...

You have very little money to spend, but you're willing to spend your own time to get a system up and running and configured to meet your needs. You've got someone pretty tech savvy on staff or on call who would find it fun to figure out a database and help you adapt it to your needs.

- **CiviCRM**, by CiviCRM LLC
- **Nonprofit Success Pack**, by Salesforce Foundation

## You want to track all your constituents in one system...

You do substantial fundraising, but you interact with people in other ways as well—not just event registrants but other types of people such as volunteers, program participants, and others—and you want to centralize all that into one system. You want to do it right, and can invest some money or effort if needed.

- **Causeview**, by Breakeven, Inc.
- **CiviCRM**, by CiviCRM LLC
- **Nonprofit Success Pack**, by Salesforce Foundation
- **Talisma Fundraising Online**, a Campus Management Solution
- **The Raiser's Edge NXT**, by Blackbaud

## You need to integrate the system tightly with email and your website...

You do a lot of communications and fundraising online. Any system should be able to talk to your website, automatically pull in online donors, let people sign up for your email list, send out broadcast emails and, ideally, let people update their own information online...as well as support a reasonably robust fundraising program.

- **Bloomerang**, by Bloomerang
- **DonorCommunity**, by DonorCommunity
- **eTapestry**, by Blackbaud
- **EveryAction**, by NGP VAN
- **Kindful**, by Kindful
- **NeonCRM**, by Z2 Systems
- **Salsa CRM**, by Salsa Labs
- **The Raiser's Edge NXT**, by Blackbaud



## You need something highly configurable...

Your processes and interactions are truly unique, and the typical functionality offered by most systems won't meet them. You need something that's highly configurable—not just a few custom fields here and there, but something that will let you track custom interactions with people and tailor the workflow to your needs.

- **Causeview**, by Breakeven Inc.
- **CiviCRM**, by CiviCRM LLC
- **Nonprofit Success Pack**, by Salesforce Foundation
- **Talisma Fundraising Online**, a Campus Management Solution

## You need a system that will help you categorize your donors...

You have a lot of individual donors and need to identify your most engaged supporters, or which donors should be targeted for bigger asks. Your fundraising staff may not have strong relationships with your donors, or you are just now getting started with converting supporters into major donors, and need to quickly identify your prospects.

- **Bloomerang**, by Bloomerang
- **DonorPerfect**, by SofterWare
- **Donor Tools**, by Higher Pixels
- **Fundly CRM**, by NonProfitEasy
- **NeonCRM**, by Z2 Systems
- **Nonprofit Success Pack**, by Salesforce Foundation
- **NPOconnect**, by YourCause (formerly Orange Leap)
- **Salsa CRM**, by Salsa Labs
- **The Raiser's Edge NXT**, by Blackbaud

## You need access on the go...

Your staff members are frequently away from the office and need access online—or even on a smart-phone. Ease of access from anywhere in a high quality system is your top priority. While most systems in this report are Cloud solutions that can be accessed by any browser, some make it easier than others to quickly find important donor information, record a donation, or run reports from mobile devices.

- **Bloomerang**, by Bloomerang
- **DonorPerfect**, by SofterWare
- **Fundly CRM**, by NonProfitEasy
- **Network for Good**, by Network for Good
- **Nonprofit Success Pack**, by Salesforce Foundation
- **The Raiser's Edge NXT**, by Blackbaud

## Other good values...

Some of these systems aren't easily categorized by the scenarios above, but are particularly suited for specific audiences.

- **@EASE Fund Development Software**, by Batsch Group Inc.: particularly for sophisticated contact management needs.
- **Abila Fundraising 50**, by Abila: particularly for those with sophisticated but somewhat-tech-averse fundraising staff.
- **EveryAction**, by NGP VAN: particularly for integrated advocacy and organizing tools.
- **Exceed Beyond**, by Telosa Software: particularly for guest and room management features.
- **Sustain Fundraising Management Software**, by Sustain, LLC: particularly for small and mid-sized education-oriented organizations.
- **Total Community Manager**, by Unger & Associates, LLC: particularly for organizations working with volunteers or Public Land Trust programs.
- **Total Info**, by Easy-Ware: particularly for ticketing and point-of-sale systems.

# RECOMMENDATIONS BY USE CASE

	You just need the basics	You're a tiny but growing organization, and price is critical	You need something easy to set up and use	Fundraising events are a critical part of your process	You're pretty tech savvy, and you want a free system	You want to track all your constituents in one system	You need to integrate the system tightly with email and website	You need something highly configurable	You need a system that will help you categorize your donors	You need access on the go	Other good values
@EASE Fund Development Software											
Abila Fundraising 50											
Akubo CRM											
BasicFunder Premier											
Bloomerang											
Causeview											
CiviCRM											
DONATION											
Donor Tools											
DonorCommunity											
DonorPerfect											
DonorSnap											
eTapestry											
EveryAction											
Exceed Beyond											
Exceed! Premier											
FastFund Raising Online											
Fundly CRM											
FundRaiser Select											
Kindful											
Little Green Light											
MatchMaker FundRaising Software Enterprise Edition											
NeonCRM											
Network for Good											
Nonprofit Manager											
Nonprofit Success Pack											
NPOconnect											
The Raiser's Edge NXT											
ResultsPlus											
Salsa CRM											
Sumac											
Sustain Fundraising Management											
Talisma Fundraising Online											
Total Community Manager											
Total Info											

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# THE BEST VALUE SHORTLIST

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For each of the 35 systems included in this report, we asked the vendors to conduct half-hour online software demos of their systems. We then scored each system against our requirements criteria and chose 11 systems that we felt best met the needs of nonprofits within a range of affordability: under \$3,000 in the first year for an organization with one user and up to 1,000 donor records. For us, these systems offer the best combination of functionality and attractiveness in a variety of situations. We then asked vendors to conduct additional two-to-three hour online demos of these 11 systems to show us all they were capable of.

In selecting them, we prioritized functionality to manage complex gift and donor information, issue printed acknowledgement letters, usability, querying and reporting, configurability, managing constituent data beyond donations, and price.

These are not necessarily the 11 best systems, as every organization's needs vary. There are also more powerful systems available at greater expense. But these systems are strong in fundraising and applicable to wide range of organizations. They also represent the variety of systems on the marketplace. Browser-based Cloud solutions, traditional installed software, open source platforms, full CRM tools—you'll find a little bit of everything in this list.

We evaluated each of these systems based on a list of 155 criteria. The matrix on the next page summarizes our findings based on a rating scheme (the scheme itself is defined in *Appendix B*). However, we have much more information. For detailed evaluation for all 11 systems, see the *Reviews of the Donor Management Systems*, starting on page 48.

This list has changed since the last version of this report. Of the new systems included in this update, three made the cut: Bloomerang, Exceed Beyond, and Salsa CRM. In addition, Fundly CRM (formerly NonProfitEasy) by NonProfitEasy, and the Nonprofit Success Pack by Salesforce Foundation are new to the Best Value list but not to the report. SuiteDonor was bumped from the list since our last edition of the report, as was Talisma Fundraising—which made the cut this time, but the vendor was unable to schedule a longer demo.

Finally, The Raiser's Edge NXT appeared on this list for the last edition of the report, but did not make the cut this edition as we lowered the pricing cutoff to the \$3,000 threshold. However, because of the strength and flexibility of that system, we've given it a longer description in the *Index of Donor Management Systems* as we think it is worth consideration if you need the extra power it offers and have the budget for it.

## Near-Misses

While not on our Best Value Shortlist, these systems are strong contenders worthy of serious consideration:

- **Causeview**, by Breakeven, Inc.
- **DonorSnap**, by DonorSnap
- **MatchMaker FundRaising Software Enterprise Edition**, by Heritage Designs, LLC
- **NPOconnect**, by YourCause (formerly Orange Leap)
- **The Raiser's Edge NXT**, by Blackbaud
- **Talisma Fundraising Online**, a Campus Management Solution
- **Total Info**, by Easy-Ware

# HOW THE SYSTEMS COMPARE

	Bloomerang, by Bloomerang	CiviCRM, by CiviCRM LLC	DonorPerfect, by SofterWare (Basic)	DonorPerfect, by SofterWare (Full)	eTapestry, by Blackbaud (Basic)	eTapestry, by Blackbaud (Full)	Exceed Beyond, by Telosa Software (Basic)	Exceed Beyond, by Telosa Software (Full)	Fundly CRM, by NonProfitEasy	Little Green Light, by Little Green Light, LLC	NeonCRM, by Z2 Systems (Basic)	NeonCRM, by Z2 Systems (Full)	Nonprofit Success Pack, by Salesforce Foundation (without apps)	Nonprofit Success Pack, by Salesforce Foundation (with apps)	Salsa CRM, by Salsa Labs	Sumac, by Sumac (Basic)	Sumac, by Sumac (Full)
Adding and Tracking Donations	○	○	○	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Managing Donor Information	○	○	●	●	●	●	●	●	●	●	○	○	●	●	●	○	○
Social Media Integration	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Prospecting and Proposals	○	○	○	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Permissions	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Mail-Merging Letters	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Emailing	○	○	○	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Querying	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Reporting	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Payment and Website Integration	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Tracking Events	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Tracking Other Built-in Interactions	○	○	○	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Customization	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Integration	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Accounting Support	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○
Ease of Use	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Support and Training	○	○	●	●	○	○	○	○	○	○	○	○	○	○	○	○	○
Installation and Maintenance	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○
Product Background	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○

**Basic** refers to the cheapest version of the system you can buy, **Full** to the version with all upgrades and modules that have an impact on this review.

• None ○ Fair ○ Good ● Excellent

# PRICING COMPARISON

This matrix summarizes the list cost for each of the 11 systems on our Best Value Shortlist. Note that some vendors routinely discount from the list cost, particularly if you're buying a number of extra modules or consulting services. It's always worth getting an estimate directly from the vendor.

	One User; 1,000 Donors		Three Users; 20,000 Donors	
	First Year	Yearly Ongoing + Email Support	First Year	Yearly Ongoing + Email Support
Bloomerang, by Bloomerang	\$1,188	\$1,188	\$4,788	\$4,788
CiviCRM, by CiviCRM LLC *	\$0	n/a ***	\$0	n/a ***
DonorPerfect, by Softerware	\$1,068	\$1,068	\$5,508	\$5,508
eTapestry, by Blackbaud	\$1,428	\$1,428	\$4,788	\$4,788
Exceed Beyond, by Telosa Software	\$840	\$840	\$5,040	\$5,040
Fundly CRM, by NonProfitEasy	\$600	\$600	\$6,000	\$6,000
Little Green Light, by Little Green Light, LLC	\$421	\$421	\$745	\$745
NeonCRM, by Z2 Systems	\$600	\$600	\$4,920****	\$4,920****
Nonprofit Success Pack, by Salesforce Foundation *	\$0	n/a ***	\$0	n/a ***
Nonprofit Success Pack, by Salesforce Foundation (with apps) **	\$1,092	\$1,092	\$1,092	\$1,092
Salsa CRM, by Salsa Labs	\$2,699	\$2,699	\$4,968	\$4,968
Sumac, by Sumac	\$240	\$240	\$5,500	\$4,800

\* There's no license fee for this product; the vendor provides it for free.

\*\* As this not an out-of-the-box system, we've estimated costs a user could expect to see with functionality from the AppExchange for broadcast email, online payment processing, social media integration, third-party automation tools, and accounting integration. Actual costs may vary.

\*\*\* Pricing for support will vary depending on the consulting firm that provides this service.

\*\*\*\* Pricing based on NeonCRM's Impact package, which includes all functionality covered in this report but not premium support.



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# HOW TO CHOOSE

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Even if you don't have a lot of money to spend, you'll find a lot of different donor management software packages available to you. It's good to have that much choice, but making a decision can be difficult. What's more, switching systems is a time-consuming process, so it's important to think your needs through carefully up front and make a choice that will last.

How should you narrow down the choices and focus on the packages likely to work best for you? Here are a few tips:

## Make a plan for all your constituents and interactions.

Donors are just one piece of the puzzle. Think through all the people your organization interacts with on a day-to-day basis—and all the ways you interact with them, both online and off. Then make a plan for how you'll track data about them. Ideally, you'd be able to see an all-in-one-place overview of everything a person does with your organization. This might mean tracking all the data in one system, or being able to integrate data from multiple systems together. But don't purchase a donor management system without understanding how it will fit into the larger picture.

## Don't over-prioritize price.

First off, don't let minor differences in price be a big factor in your decision-making. Saving money is important, but a few hundred dollars shouldn't dictate your fundraising future. Instead, factor in the time you'll save by using a more efficient system—simply being able to more easily print customized letters and send emails can save a lot of time. And better communications, more information about your donors and campaigns, and more support for effective prospecting—paired, of

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## Saving money is important, but a few hundred dollars shouldn't dictate your fundraising future.

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course, with an effective fundraising strategy—can help bring in thousands of dollars more a year even for small organizations. Which means the system pays for itself over time.

While some of the systems in this report have a significant, but one-time, licensing cost, others are Software-as-a-Service (SaaS), meaning that you pay a smaller, monthly or yearly fee to use the system. The subscription model is likely to cost more in the long-term, but doesn't require a significant up-front investment. With SaaS systems, technical support and maintenance are provided by the vendor, and included in the subscription costs.

## Understand your own donor processes.

Some organizations use very specific fundraising processes. Others are more experimental. It's important to understand how you work in order to assess a system's fit. Do you want to be able to move prospects carefully through a series of stages and priorities? Is it important to be able to flexibly query to find any set of potential prospects under the sun? Do you need

a lot of prepackaged reports, or would you rather be able to create your own? There are lots of good systems, but better understanding your own needs can help you find the system that's best-suited to you.

## Identify your communication priorities.

The systems vary considerably in their support for creating mail-merged letters and sending email. Some are only really good at one of these. Others fare poorly at both. Think through your needs in this area and determine what's important to you. Support for broadcast email is becoming increasingly common, especially among hosted systems—some of which have integrations with mass mailing specialists like VerticalResponse and Constant Contact.

## Estimate your numbers now—and in the future.

How many donors do you plan to store in the system? How many staff members will be using it, now and three years from now? The cost structures vary a lot between different systems, so one that is cheap now might not be if you double your number of donors. One that's a bit of stretch now could turn into a wise investment if it easily scales to support many more donors and users with little extra cost.

## Weigh flexibility vs. complexity.

It can be tempting to prioritize a system that allows you to continue to work in exactly the way you always have—and the flexibility to add custom fields and custom interactions can be useful. But often, a new system provides a great opportunity to rationalize and streamline your process, and potentially bring it closer to existing best practices. If you can map your process to standard practices, you'll likely be able to use a cheaper and less complex system.

## Consider the priority of accounting controls.

Some of the systems offer very little in the way of features to reconcile your gifts with your accounting systems. Others require you to consider accounting

batches, or even accounting funds, every time anyone enters a gift. Some offer a mix, or can be set up the way you want. What will work best for you?

Hopefully, the information in this report will help you understand what's available and narrow your search to a handful of options. You'll certainly want to take a careful look at those systems yourself before making a final decision, though. Think through your needs carefully—which of the features described here are critical for you? Which are only nice to have, or not useful for your organization? What other features, which aren't discussed here, might be useful?

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## You'll certainly want to take a careful look at the systems yourself before making a final decision.

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With that list of important features in hand, contact the vendors and ask for demos. Ask them to show you exactly the features you consider important. Consider giving them a script which walks through the tasks you'd like to see demonstrated—for example, “I add a gift to the system, and then create a thank you letter.” This can be very useful to help compare different systems to each other.

Study the system carefully—does it seem like something your staff can, and will, use? Does it mesh well with the type of fundraising you do? If it feels like the system or the vendor just doesn't “get it,” that's an important sign that the system isn't the right fit for your organization.

Each available option has its own strengths and weaknesses. It doesn't matter how good a particular system is if it doesn't fit your organization's needs. Regardless of what we say in this report, it's critical to take a look for yourself, and make your own decision.

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# **INDEX OF LOW-COST DONOR MANAGEMENT SYSTEMS**

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# INDEX OF DONOR MANAGEMENT SYSTEMS

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Now that you've read through our thoughts and recommendations about the systems, it's time to dive down into more detail. This section provides short Idealware reviews of each of the systems included in this report. They're arranged in alphabetical order by system name. For the 11 systems on our Best Value Shortlist, there's even more detail—you can find a six-page review of each beginning on page 49.

## @EASE Fund Development Software, by Batsch Group Inc.

### Installed on PC or Mac computers or Online hosted system

From the Canadian Batsch Group, @EASE is a back-office oriented database for individual, major, and corporate or foundation donors that can be installed on your desktop computers or hosted using Microsoft Azure for remote access. The interface will be familiar to users of Blackbaud's The Raiser's Edge, with prominent navigation icons and a tabular layout for most menus and windows, including the query builder, reports, and the donor profile. While these tabs are clearly labeled and organized, you'll need to navigate between tabs to get a full view of a donor's information and history with your organization—however, this is offset by the variety of standard reports that come out-of-the-box, which are clearly organized by the type of information you are trying to see (donors, volunteers, campaigns, donations, etc.). There's no easy way to create ad hoc or custom reports, however—if you need reports beyond what is provided, the vendor can build out new reports by request, at no additional cost. Entering a gift is a straightforward process of selecting the campaign the gift is associated with, finding the donor, and entering the payment information. New donations are processed in batches, and the eReceipting option will automatically generate email gift receipts. Pledges are added in a similar process, and the system will automatically schedule out pledge installments through the end of the current year—incoming pledge payments are automatically added to a batch, which you can post to process along with other pending payments. The query builder, Q-Xpress, comes with a useful selection of pre-configured filters for common searches, which can be easily configured. Different types of queries are separated into different menu items, however—you'll open up different windows to select a list of donors or exclude a list, for example. The included contact manager tool (named Dickens) syncs your organization's calendars to centrally manage reminders and calls or meetings with donors inside the system itself, and you can generate broadcast email through an integration with Constant Contact—you can identify the list of supporters to email by running a query and send the list into Constant Contact with a single click. However, there is no built-in support for mail merging—you'll need to export the list of donors you need to contact and manually merge into a letter template in your word processor. Pricing starts around \$4,200 for one named user and up to 1,000 donor records, up to \$6,880 for five named users and unlimited donors. Online donation forms and credit card processing are available through the optional Donate Now module, which costs about \$300 in the first year, with an annual charge of about \$60 per year and a 2.5 percent fee per transaction. Ongoing support for the system costs about \$1,387 per year.

## Abila Fundraising 50, by Abila

### Installed on Windows computers

Fundraisers who have tracked data by hand may appreciate Fundraising 50 from Abila, Inc., as the main screens of the app look like index cards, complete with a header margin and horizontal lines. Above the index card are two rows of nine tabs each. Click each tab to view the constituent's address, relationships, volunteering data, gift history,

and more. Four of the tabs allow you to track custom constituent fields. Fundraising 50 handles standard gift tracking tasks well. It supports pledges, split gifts, batch entry of gifts, and acknowledgement of gifts with print and email templates. The system comes with around 100 standard reports. You can create and run custom queries, as well. The system streamlines communication with your constituents: select a set of records, then merge data into a Word document to print. Email communications work in a similar manner and rely on your organization's email server for delivery. As such, some useful email information such as delivery confirmation, opens, and click-through information isn't tracked by the system. Fundraising 50 works well with optional software solutions from both Abila and the company's former owner, Sage. Abila Fundraising Online supports online giving, peer-to-peer fundraising, and event registrations, which can then be imported into Fundraising 50. The system also supports data import from Donate Now and other payment systems. Then you can export donation records from Fundraising 50 to use in Abila MIP Fund Accounting, Sage 50 (formerly Peachtree), or QuickBooks. One-time perpetual license price of \$3,400 for one user (or \$5,900 for three users), plus an annual fee of 25 percent of the license price for maintenance and support. Fundraising 50 is also available on a subscription basis at a cost of \$79 per user per month (\$948 per user per year) on-premises, or \$99 per user per month (\$1,188 per user per year) hosted. Subscription pricing includes maintenance and support.

## Akubo CRM, by Akubo Software, Inc.

### Online hosted system

Akubo provides a basic, straightforward donor management solution suitable for smaller nonprofits. Since we last looked at the system in 2013, the vendor has redesigned the user interface, which is now cleaner and easier for novice users to find the actions they need to take. Adding a donation or pledge is a relatively straightforward process of finding a donor and adding the payment or pledge to the record. Pledges are recorded as any other gift, but simply marked as unpaid; to record the pledge payment, you would have to change this status. Akubo has fairly strong abilities for generating emails and letters—the user can create one-off thank you letters and emails in the same straightforward process from the donation screen, and both individual and bulk emails are sent through the vendor's servers, potentially protecting your organization from blacklisting issues. The system has useful querying and search capabilities, but otherwise lacks a real ad hoc reporting feature. Since we last saw the system, the vendor has added built-in support for managing membership levels and payments as well as registration pages for free or ticketed events—however, to accept online donations you'll need to use the third-party payment processor of your choice and connect it to the system. Pricing for Akubo CRM is based on both the number of users and the number of donor records you keep, starting at \$250 per year for two users and up to 2,000 donor records for Akubo Basic accounts, up to \$700 per year for 10 users and 10,000 records.

## BasicFunder Premier, by Jellyware Corporation

### Installed on Windows computers

For organizations looking for a single low cost for as many users as you'd like, BasicFunder Premier offers a nice set of basic features. Since we last looked at this system in 2013, the vendor has enhanced the optional volunteer module, allowing organizations to track a volunteer's applications, references, and background checks in addition to hours worked, while the events management module can handle most needs for in-person events, including table or group assignments and tickets. Entering new donations is a straightforward process, and it's easy to split a single gift across multiple funds or program areas, although there is no built-in support for online donations—you must manually import transactions from your online payment processor. The pledge functionality is still here, allowing you to easily schedule out the expected gifts—while there are no in-system notifications for outstanding pledges or prompts of outstanding pledges when entering a new donation, BasicFunder Premier does provide a useful set of canned reports to track pledges, and it's easy to apply a gift to a pledge after the donation has already been recorded. The system provides a simple but useful internal word processor for creating mail-merged letters, and allows for



HTML-formatted mass email. Mass emails are sent through the new MailChimp integration, protecting users from the risk of blacklisting. Reporting features have been improved since 2013, allowing users to drill down on report results—a pleasant addition to the existing canned reports with simple date range options, ad hoc pivot-type-table report builder, and list-builder to create queries and define what fields you want to see for them. Users are able to define multiple relationship types—such as spouse, employer/employee, son, daughter, etc.—but can only view all of a donor’s relationships through the Donor Link screen, and it’s not possible to view total giving for a household without building a query or report. It’s also not easy to view an interactive summary of donor information within the system, as you must move to different tabs to see contact information, giving history, or other interactions, but you can easily generate a summary to print from the donor’s record. A one-time licensing fee of around \$300 covers unlimited records for your entire organization and a year of support—ongoing support costs \$120 per year. All in all, it provides a limited but useful set of features at a reasonable price. Several updates have been made to this system since our 2013 report.

## Bloomerang, by Bloomerang

### Online hosted system

Bloomerang focuses on donor retention. The Cloud-based system displays donor retention data on login and features an “engagement indicator” on each constituent page, with a score calculated from the constituent’s activity (including constituent Tweets). To help you craft easy-to-understand, donor-centric communications, the built-in word processor offers an “Ahern audit” that calculates both the ratio of “I/we” words to “you/your” words in a letter and a reading level analysis. Bloomerang relies on visual design to help move data through the system. Web form templates for online giving, event registration, email sign-up, volunteer activity, and more, make it easy to bring data into the system. A vertical timeline of activity, with icons for different types of tasks, makes donor activities quickly viewable. A reporting tool with “include” or “exclude” selectors makes the impact of changes visible, since results display below. The system doesn’t include every feature. You can merge and print letters, but you’ll need to export, merge, and print labels manually. You can track pledges, but must enter irregular pledge payment schedules manually. By request and for a fee, Bloomerang will update records with current USPS data and provide a list of changes made. Other optional integrations add features and cost: DonorSearch brings in wealth information, Qgiv adds peer-to-peer fundraising, and Aplos syncs accounting data in real-time. Bloomerang offers the system at five price points based on the number of records. Pricing begins at 1,000 records and 5,000 emails per month for \$1,188 per year. A version for up to 25,000 records and 125,000 emails per month costs \$4,788 per year. All versions allow unlimited online giving pages/forms, an unlimited number of users, and free email/chat support and group training. Unlimited phone support, plus an hour of personalized training each year, costs extra.

## Causeview, by Breakeven, Inc.

### Online hosted system

Causeview is a donor management system built upon the Salesforce CRM platform by Breakeven, Inc., a Canadian software company that provides Cloud solutions for nonprofit organizations. Salesforce’s quick-search function remains an integral part of the software. Donations are tracked and managed through the custom Transactions object, which handles one-off gifts, pledges, recurring donations, event registrations, and purchases—it’s easy to split a gift between different appeals, campaigns, or funds, and recurring gifts and pledges can be scheduled automatically. However, applying a gift to a pledge could be easier, as you must navigate to open pledges on the donor’s profile to apply the gift, and the system does not prompt you about outstanding pledges at gift entry. Causeview also has a helpful batch entry mode, which lets users record, process, and acknowledge multiple gifts at once through the spreadsheet-like online interface, or upload an Excel spreadsheet with the provided template for fast gift entry. Householding is robust, and searches against existing individuals before adding new household members to minimize duplicates in the system. Causeview integrates directly with iATS payment processing for online donations—

processing fees for iATS vary by region, typically around 2.95 percent plus \$0.21 per transaction when integrated with Causeview. You can configure the system to automatically send a thank you letter and receipt from one of the unlimited, flexible templates after a one-off donation, but it's not possible to personalize an individual thank you letter without creating a new template. Querying out of the box is standard Salesforce interface, and for now there's no built-in integration with an accounting system. A robust volunteer management module allows you to track and view skills, interests, and activities as part of the donor record, and support for free or ticketed events is provided through the easily-customized online action pages. Causeview requires a minimum of three user licenses, which cost \$2,160 per year (\$720 per user), with a one-time implementation fee of \$3,150. Pricing includes online support and registration and donation forms; web portals for donors, events, and volunteers are available at an additional fee.

## CiviCRM, by CiviCRM LLC

### Online hosted system

CiviCRM provides an open source web-based system to help nonprofit organizations organize constituent information, handle donations and memberships, and engage communities. The system manages gifts, pledges, memberships, constituent information, and reporting solidly. CiviCRM aligns well with the values many nonprofit organizations hold. It's free to use, and the code is free to study and share. You can download and deploy CiviCRM and configure it to work with your Drupal, Wordpress, or Joomla! website. If you're technically skilled, you're free to improve the code, then share your changes with the community. CiviCRM bundles functionality into components and extensions that you can enable and add as desired. Components deliver major features: CiviContribute handles donations, CiviMail delivers email newsletters, CiviEvent offers registration and event management, and CiviCampaign tracks progress toward goals across several component modules. Other modules assist with grants, volunteers, and case management. Extensions enhance functionality, but more narrowly than components. For example, an extended reports extension expands reporting options, a MailChimp CiviCRM Integration extension keeps email lists in sync, and an iATS Payments extension offers a variety of online payment options. A core team of six developers, one project manager, and a community of around 100 individual contributors builds and maintains the CiviCRM project, components, and extensions. As such, the rate of development—of the core, of components, and of extensions—varies. When one component gets a user interface update, others might not. This can produce a less-consistent user experience than might be desired. While there's no fee for the CiviCRM software, the system does require a web server and a web Content Management System. You'll also likely need to budget for an email provider and a payment processor to handle donations. If you need technical assistance with the system, CiviCRM.org maintains a list of partners that provide consulting, development, or hosting services.

## DONATION, by Software4Nonprofits

### Installed on Windows computers

This basic, entry-level installed system is an interesting option for smaller organizations and churches seeking to step up from a spreadsheet who don't need a full featured donor management system. DONATION lives up to its name with a simple and straightforward gift entry process right on a donor's record, and finding a particular donor is easy, thanks to an ever-present list of all records along the side of the interface. Thanking a donor is straightforward, and receipt and letter templates can include images like logos or signatures, and receipting supports both US and Canadian Revenue Service standards. In addition to receipts, DONATION does allow you to generate merged letters for mailings with a minimum of steps, and you can email donors directly from the system, through the same server as your organization's email, potentially exposing your domain to blacklisting. If you're going to send newsletters to your list regularly, you'll need to export a spreadsheet of the donors to email for importing into a third-party broadcast email client to avoid this risk. The system includes a solid list of useful standard reports, and it's pretty straightforward to build and save a new custom report, but there's no real support for householding or tracking relationships, and there's no ability to customize the system beyond six text fields and two category fields that you

can rename. Pricing starts at a very reasonable \$90 one-time licensing fee for one user, up to \$160 for up to five simultaneous users. Support and upgrades for the first year is included in the license—after the first year, you can choose to pay an annual fee starting at \$45.

## Donor Tools, by Higher Pixels

### Online hosted system

Donor Tools, a web-based application from Higher Pixels, seeks to deliver affordable simplicity to help nonprofit organizations, churches, and even political candidates track donations. The system handles all the basics: constituent contact information, donations, pledges, and acknowledgements. Plus, a detailed audit history helps you see who changed what data (i.e., view all the changes made by a user or to a constituent record). Smart Tags—and tags—provide a powerful alternative to complicated reporting systems. Define the criteria and a smart tag will automatically apply itself to a record. For example, set a smart tag to identify donors who gave more than \$1,000 last year, and it will automatically appear alongside a constituent's record. Manually apply a regular tag, such as "current board member" or "prospect," to group records any way you want. Donor Tools doesn't try to do everything. The system won't auto-prompt when entering pledges; you apply payments manually. An online payment via PayPal, however, will be applied toward an outstanding pledge automatically. There's no ability to add custom fields; you work with the fields you have. There's no merge capability in the system; you export lists to merge with Microsoft Word. And to track two people in a household, you add a second name to a donor record. Donor Tools does work with some widely-used apps: sync tags to email lists in MailChimp, process donations with PayPal, or export donation data to QuickBooks. (Need to work with donor data elsewhere? Have a developer create a connection with Donor Tools' open API.) Donor Tools costs a flat monthly fee of \$79 per month (\$948 per year). A lower-cost version limits your organization to 5,000 records, 10 Smart Tags for custom reports, and no more than 10 funds and 10 sources, for \$39 per month (\$468 per year). Both levels offer an unlimited number of users.

## DonorCommunity, by DonorCommunity

### Online hosted system

DonorCommunity is a web-based system popular in the child welfare services community, among others, combining a constituent database with email marketing, peer-to-peer fundraising, event registration, and website content management in one system. If you do use the content management features, users can log in to the back end of the system directly from your public-facing website. The user interface is clean and accessible, and it's easy to search for a donor, and you can view a donor's entire history with your organization directly from the search results. While it's easy enough to define custom relationships between donors and control email and address preferences for household mailings, there's no easy way to see total giving per household from a single place—you'll need to see each related donor's giving and add it up yourself. Users can set reminders for outstanding pledges through the "Tasks" section, and schedule installments for a pledge, but otherwise pledges are treated the same as any other gift—once you've received payment, you'd manually go into the pledge to mark the payment as accepted. Online giving is seamlessly integrated into the database, and gifts given online automatically show up in a donor's giving profile—in addition to the credit card transaction fee, DonorCommunity also charges a convenience fee per transaction depending on subscription level (the vendor reports an average fee of 1.75 percent). The system has strong capability with its built-in broadcast email functionality; queries of donors are built and saved as "mailing lists" in order to send out communications. There are some useful standard reports that come with the system, but for organizations with more specific analytical needs, there is still no clear way of assembling ad hoc reports—you'll need to duplicate and adjust an existing report. DonorCommunity's pricing is determined by the number of donor records you'll store, and includes unlimited users, training, and support. An organization with 1,000 donor records could pay as little as \$2,400 per year, including support for event registration, online donations, and email, with a one-time setup fee of \$500.

## DonorPerfect, by SofterWare

### Online hosted system

DonorPerfect, from SofterWare, Inc., delivers a full-featured Cloud-based constituent management system at five pricing tiers, which are based on donor record count and features. Since 2013, DonorPerfect updated to a modern design and significantly expanded built-in step-by-step help. DonorPerfect handles core donor management tasks for constituents, gifts, pledges, payments, and communications. Credit card payments and bank draft withdrawals are processed within the system. Donors can be thanked via either email or Word, where you can customize templates, merge, and print. Mobile apps for iOS and Android let staff update data on-the-go, and a customizable dashboard lets each desktop user see the data that matters to them. The most popular tier, “Express,” supports up to 2,500 constituent records, includes all the features above, and also offers integrated online forms and Constant Contact. You can add some features, such as an easy-to-use report writer, for a monthly fee (in this case, \$29 per month). But not all features are available as add-ons; some require a specific subscription tier. For example, scheduled reports functionality requires an upgrade to “Essentials” or higher. DonorPerfect also offers an app store, <http://connect.donorperfect.com>, of third-party apps that integrate with the system. These apps typically cost extra. The Lite version starts at \$1,068 per year, supports up to 1,000 constituent records, and includes the core donor management tasks, while the Premier version costs \$5,508 per year and supports up to 25,000 constituent records. There is also an Enterprise version for larger nonprofits. For any tier, you can manage 1,000 or more (the quantity varies by tier) additional records for a fee of \$29 per month. All tiers include webinar training, chat support, and allow an unlimited number of users.

## DonorSnap, by DonorSnap

### Online hosted system

DonorSnap will be of interest to organizations in the market for a low-cost hosted system that provides well-rounded donor management functionality in a user-friendly manner. You can search any number of user-defined fields from the search screen, accessible from the search button. Donor information is displayed in a comprehensive and cleanly displayed profile. DonorSnap lets you easily create custom fields that can be placed virtually anywhere in the system. There’s also basic support for householding and relationship tracking. Querying is strong, if sometimes complicated, and the system includes an array of useful donor reports that can be customized, saved, and emailed on a scheduled basis. Manually entering multiple gifts in bulk is accomplished through a straightforward and useful Mass Entry interface, and since we last reviewed the system in 2013, DonorSnap now integrates with QuickBooks. Online donations are supported through mobile-responsive forms at no additional cost, but you will need an account with GoEmerchant to process those donations. GoEmerchant charges a \$15 monthly fee and a per transaction processing fee. The vendor reports that GoEmerchant will match your existing rates if they are lower. DonorSnap charges only based on number of contacts in the system, and offers unlimited users. An organization with up to 1,000 donors would pay as little as \$450 per year, while an organization with up to 30,000 donors would pay \$2,270 per year. There is a one-time setup fee of \$200 for new users—the vendor reports that this fee is waived for organizations migrating from GiftWorks.

## eTapestry, by Blackbaud

### Online hosted system

eTapestry, a Cloud-native system from Blackbaud, seeks to serve small to mid-sized organizations that do not yet need the capabilities of the company’s more powerful—and more expensive—The Raiser’s Edge NXT. eTapestry handles online and offline gift tracking and manages mail and email acknowledgements, all from a tile-based customizable page layout. All versions let you publish up to 10 online forms for online giving, event registration, volunteer sign-up, and more. The system includes around 50 prepackaged reports, including a set of “executive



reports” that provide campaign analysis, highlight donor renewal rates, and examine consecutive years of donor giving. Blackbaud re-designed and streamlined the query and report system since our last look at eTapestry. Now, you can change the fields displayed dynamically from the query preview screen; no need to specify fields elsewhere, then re-run your report. While eTapestry lacks a special batch entry mode, you may set a few field defaults for faster data entry or import data from a spreadsheet. Donation data may be exported to more than 10 different accounting packages, including QuickBooks and BlackBaud’s own Financial Edge. Blackbaud offers eTapestry at three price points, based on the number of records, ranging from 1,000 records for \$1,428 per year up to 20,000 records for \$4,788 per year. All packages include AddressFinder to update mailing addresses, but higher price point offerings allow for more annual updates of data. The higher price point offerings also add access to add-ons, such as WealthPoint Rating. Other paid add-ons include Everydayhero Pro (a Blackbaud service that handles peer-to-peer fundraising), an online gift store, MatchFinder (a Blackbaud service that automatically identifies organizations that match employee gifts), as well as additional records, emails, forms, and more. All versions allow unlimited number of users.

## EveryAction, by NGP VAN

### Online hosted system

EveryAction, by NGP VAN, brings the company’s political fundraising and organizing solution to the nonprofit market. Commonly-used functions—like adding a new contact or donation—are prominently displayed on the user dashboard, making it easy for users to take action. Adding a new donation is straightforward, with a minimum of required fields, and after a donation is entered the system will notify you if the donor has any open pledges that match the gift. However, there’s no dedicated batch entry screen to manually record multiple gifts at once—for example, a pile of checks. Instead, the gift entry screen gives you the option to post one donation and move right onto the next, or you can upload a spreadsheet. As the system is designed to support organizations managing a high volume of individual donations, it’s not designed to send one-off thank you letters or receipts—instead, you need to run a report to identify the list of donors to acknowledge. While the broadcast email functionality supports graphical templates with merge fields, as well as more advanced features such as A/B testing, there’s no ability to generate print acknowledgements in the system. In order to generate thank you letters or direct mail, you’ll need to export the list of recipients as a spreadsheet to manually merge in Microsoft Word. The system provides a few canned reports for more complex needs—like LYBUNT reports—as well as a good selection of pre-built report templates. The report builder itself is well-designed, allowing you to refine the filters and add or remove columns and grouping from the results, without needing to run the report again. Reports can be scheduled to automatically run at a specific day and time and email the results to one or more recipients, but currently there’s no ability to add reports to the user dashboard or create charts or graphs—you’ll need to manually create any visualizations in Excel. Pricing for the system starts at \$588 per year for the base donor management functionality, or \$1,608 per year for all the functionality described above—including broadcast email and online forms—for up to 1,000 donor records. An organization with up to 20,000 donors and all functionality offered would pay \$4,968 per year. All pricing plans include unlimited user accounts and free phone and email support.

## Exceed Beyond, by Telosa Software

### Online hosted system

Telosa launched Exceed Beyond in 2013, marking the company’s entry into the online, Software-As-a-Service sector after decades of installed software products. Exceed Beyond helps manage constituents, donors, gifts, memberships, and related communications and reporting. The company’s experience in the sector shows. A quick search returns results found everywhere in the system. A quick lists feature lets staff save a group of records for later use. A flexible address system lets staff attach an address to either a specific person in a household or the household as a whole. Screen layouts and displays are customizable, and fields can be added throughout the system. For more capabilities, you add modules—at \$35 per module per month. Available modules support campaign management (including moves



management), event management, volunteer management, grant management, hospitality guest/asset management, and room management. The left-navigation menu shows all the modules available to you. As you navigate to a module, related information appears to the right: a mix of tabs, fields, and scrollable data displays. New users might need a little time to identify the information that matters most on some screens, although a step-by-step indicator shows the workflow for many multi-step sequences. Partners provide additional features. Qgiv enables online giving and handles event registrations and payments. WealthEngine and DonorTrends help you better understand donors. Basic email works within the system, but Constant Contact, MailChimp, and VerticalResponse integrations offer robust email tools. Highcharts.com adds graphics to some of the more than 100 donor, constituent, gift, and other system reports. Exceed Beyond begins at \$840 per year for up to 1,000 records, and increases with the number of records stored—25,000 records would cost \$5,040 per year—although there are discounts for multi-year contracts. Pricing includes free email and web-based support, and an unlimited number of users. Additional training and support options are available for a fee.

## Exceed! Premier, by Telosa Software

### Installed on Windows computers

Telosa Software offers two donor management systems sold as installed software, Exceed! Premier and Exceed! Basic. Of the two, Premier provides more customizable fields, better reporting capabilities, and supports add-on modules to manage volunteers, grants, and more. Premier includes around 100 standard reports and supports both custom reporting and templates. In Premier, each record tracks a household or organization with which you associate as many individuals as needed. You may attribute a gift to either an individual or a household, and can acknowledge gifts with templated letters or by email routed through your organization's email system. Premier exports information to Constant Contact or Vertical Response for bulk email communications. Premier's interface features both top and side navigation menus, with individual records displayed in a window that contains a variety of tabs, sub-tabs, and fields. The layout requires more clicks to edit information than some more modern user interface designs. Compared to Telosa's Cloud-based system, Exceed Beyond (also reviewed in this report), Premier offers less customization, less integrated support for online payment processing and email systems, and less elegant batch gift entry. For example, to enter a batch of gifts, you need to adjust a few settings, enter a group of gifts (such as all gifts to a specific campaign), then adjust a few settings and enter all the gifts of another type. However, Premier does include two modules, Campaigns and Events, which are only available as optional add-ons to Beyond. Exceed Premier starts at \$3,595 for a single-user version, with additional user licenses available for \$500 per user. An optional accounting interface for QuickBooks (desktop version) costs \$295, while other modules to track volunteers, manage grants, or research prospects cost \$895 each.

## FastFund Raising Online, by Araize

### Online hosted system

FastFund Raising Online offers nice, affordable features for tracking gifts, issuing thank you letters, and storing general information about donors, but is somewhat limited in communications—for instance, you can't edit a single letter within a batch acknowledgement process, and for mass emailing, you'll need to manually import the recipients into a third-party broadcast email client. The system provides an easy-to-understand donation history and summary of each donor, and lets you mark whether a donor is another kind of constituent as well (such as a volunteer). The gift entry and thank you letter process is friendly when entering a single gift and the batch entry interface is solid. Since we last reviewed the system in 2013, receipting and gift acknowledgements have been streamlined, with receipts for each gift automatically generated and added to a batch, allowing you to record all your donations and send out all the receipts at once at the end of the day. Accounting integration is seamless in FastFund Raising Online if you choose to use Araize's FastFund Online Accounting; if you use an external tool, you can still export transaction registers. There is still no integration for online donations—you'll need to manually import transactions from a third-party payment processor into the system. You can build queries and create ad hoc reports using a somewhat

complicated tool, and standard reports like LYBUNT, SYBUNT, and pledges outstanding come with the system. In FastFund Raising Online, you can customize a number of code types to help segment your lists, but not custom fields. Pricing for the system is determined by the number of constituent records, including one concurrent user, support, and weekly online training webinars. An additional \$30 per month allows for up to five concurrent users. An organization with one user and up to 5,000 donors could expect to pay \$456 per year, while an organization with up to five users and up to 20,000 donors would pay \$2,160 per year.

## Fundly CRM, by NonProfitEasy

### Online hosted system

Fundly CRM (formerly known as NonProfitEasy) has changed considerably since our 2013 review. The system was re-architected in 2014 to be able to accommodate larger nonprofits, and many core functions were completely revamped. The interface is clean and attractive, and screens are easily scannable with sections and other key information represented by easy-to-understand icons. Fundraising capabilities have been strengthened, from direct mail to online to grants. Veteran fundraisers will appreciate the ease of segmenting constituents to fit RFM models. There's a batch entry mode to quickly enter multiple gifts, which allows you to set defaults, and batches can automatically sync with QuickBooks. Email is sent through an integration with a third-party provider (SendGrid) and Fundly CRM provides drag-and-drop newsletter template formatting. Constituents can make donations, view their payment history and manage their recurring donations, register for events, and update their profile through either a widget placed on an existing website, page integration with Drupal or Joomla websites, or a WordPress plug-in. The system provides 160 built-in reports through a third-party tool (Exago), but many of the reports are complex and geared toward professional fundraisers and data analysts. You can create and save your own Express Reports by dragging and dropping fields into the query, then customizing the columns and sorting the data, but this requires scrolling through many different fields to find the ones you want. The system is highly customizable, with the ability to add custom fields and modules and enter custom data sets. Pricing ranges from \$600 per year for one concurrent user and up to 1,000 constituents to \$6,000 per year for unlimited users and up to 50,000 contacts.

## FundRaiser Select, by FundRaiser Software

### Installed on Windows computers or Online hosted system

FundRaiser Select has solid donation management features and can handle single pledges, though support for incremental or scheduled payments requires the purchase of a \$300 "pledges" module. While the classic top-menu interface will feel familiar, many functions are triggered by buttons marked with icons whose meaning is often unclear and may steepen the learning curve for new users (although the mouse-over help text provided will ease that curve). There's straightforward support for entering donations, and additional modules (at \$300 each) offer support for memberships, premiums, tributes, product sales, volunteer tracking, and more. Address functionality is strong—every address can be tied to a season, and there's support for international formats. A useful querying tool allows you to find a group of people, email them, or print mail-merged letters using a built-in word processor. By default, FundRaiser Select is not connected to an accounting system; the user must purchase QuickBooks integration separately for an additional \$500. While it's rather straightforward to track a household, the system does not handle other types of relationships, such as employer of, employee of, etc. Online donations are supported through the optional Donor Portal module, with a one-time setup cost of \$395 and ongoing fee of \$9.95 per month—online donation forms support both one-time and recurring credit card donations. Pricing for FundRaiser Select Installed is based on a one-time licensing fee for a single user, with additional costs for multiple users and add-on modules. An organization with one user and no add-ons could pay as little as \$1,400 in the first year and \$450 per year for the optional annual maintenance plan. An organization with three users could pay as little as \$1,900 in the first year, and \$550 per year for the optional annual maintenance plan. Hosted, online versions of the system are available, starting at \$1,140 per year for a single user. In addition to FundRaiser Select, the vendor also offers other fundraising solutions, including FundRaiser Professional, and FundRaiser Spark.

## Kindful, by Kindful

### Online hosted system

Built with an emphasis on third-party integration, Kindful provides a well-rounded set of fundraising features with easy-to-follow workflows. A prominent “Add New” button at the top of the navigation menu provides quick access to create new donor records, gifts, or pledges. Recording an individual donation is straightforward, and new gifts can be recorded against outstanding pledges through a checkbox on the gift entry screen—pledges can be handled either as a running tally to pay down, or as a schedule of regular installments. Online giving is even more straightforward—each campaign can have its own mobile-responsive donation form, with a minimum of required fields and steps. Receipts and thank-you letters are handled nicely—the system lets you assign a template to use for each campaign, allowing you to send a print or email receipt with a single-click. Broadcast email is not handled in the system itself, but the vendor provides a seamless integration with both MailChimp and Emma—the mailing lists and groups you create in the system are automatically synced with the email client, and delivery statistics on email blasts are synced back to the donor records. Querying is handled nicely—users can select the fields and activity types to search from a well-organized menu and the system will suggest available filters as you type, a plus for novice users. Queries can be saved or used to build a report—the system comes with a handful of pre-defined report templates, including LYBUNT and SYBUNT reports, but if you want to add charts, graphs, or other visualizations to a report, you’ll need to export the results as a spreadsheet and build those manually in Excel. Pricing starts at \$1,200 per year for up to 1,000 donor records, while an organization with up to 25,000 records would pay \$4,800 per year—all pricing tiers include free online and email support.

## Little Green Light, by Little Green Light, LLC

### Online hosted system

Simple workflows for the entry and retrieval of donor information, strong search capabilities, and a clean screen layout contribute to this product’s approachability. This is particularly important for organizations that rely upon part-time users and volunteers to work with the database, as these individuals lack the time to devote to mastering a complex system. Since we last reviewed this system, Little Green Light has added native support for online forms that can support single donations, recurring donations, subscriptions, and tickets—the vendor charges a fee of 1 percent per transaction, capped at \$50 per month, in addition to the transaction fees charged by the payment processor you choose (ProPay or Stripe). Reporting and querying are straightforward, built-in templates for both are especially useful for new users, and the vendor has added a new interface for quickly adding a batch of gifts at once. The system allows for event registration and management, volunteer tracking, and membership tracking. There’s still no built-in support for or integrations with accounting—you’ll need to export your transactions and manually import them into your accounting software. Users now have more control over customizing the system to their liking, with the ability to add new custom components and fields to the donor record—depending on the extent of components and fields you add, the donor profile can get lengthy and difficult to scan, but you now also have the ability to adjust how these fields are displayed and hide certain fields. Pricing for the system is determined by the number of constituent records you keep: organizations with fewer than 2,500 records would pay \$421 per year, while an organization with up to 20,000 records would pay \$745 per year. Email support and weekly online training sessions are included at no additional cost.

## MatchMaker FundRaising Software Enterprise Edition, by Heritage Designs, LLC

### Installed on Windows computers or Online hosted system

The company is run by former nonprofit development staff, and that experience shows in the application. While screens are simple and clean, the interface often incorporates icons or images whose meaning isn’t always immediate-

ly clear—for example, an hourglass on the donor record to show an outstanding pledge, and a smiley face to indicate a volunteer. It also supports lots of useful reports and is laid out nicely with lots of query options—overall, a robust system. It also has strong, automated ties to QuickBooks. Since we last reviewed the system in 2013, the vendor has added support for bulk gift entry through the new Rapid Transaction entry screen, which allows you to add multiple transactions and create new constituent records from a spreadsheet-type layout, and automatically generate thank you emails or merged letters and envelopes when submitting the batch. Automatic payment processing for donations or events can be accomplished through an integration with the partner vendor Qgiv. Pricing for the online version of the system includes unlimited donor records and is determined by the number of users. An organization with a single user would pay \$1,800 per year with a one-time setup fee of \$150, while an organization with three users would pay \$3,000 per year plus the setup fee. The installed version includes the first month of support and starts at \$2,790 for a single user, with an annual support fee of \$900; for more than two users, the price would be \$5,295, with an annual support fee of \$1,700.

## NeonCRM, by Z2 Systems

### Online hosted system

NeonCRM is a strong integrated online system with solid support for donor management. It has support for pledges, soft credits, and batches for accounting purposes, and prospect management workflows that let you track the steps taken to convert prospects into active donors. The system automatically logs internally generated communications, and can also log email you send from any other system by including a special email address in the bcc line. Gift data can be easily imported into the system. NeonCRM has very strong functionality for web integration, reporting, querying, and the ability to customize. The system includes more than 50 standard reports, and allows you to build your own custom reports. NeonCRM's web forms help you manage information for event registration, surveys, newsletter sign-ups, as well as for memberships, personal donation pages, online giving, and more. You may choose to allow constituents to log in to NeonCRM to provide restricted member-only pages, or permit people to update profile information, view their giving history and manage recurring donations, renew a membership, or access membership directories. Volunteers may also log in to track volunteer time, mileage, and other details. An iOS app allows your staff to search for donor records, add activities to records, and accept donations. There are 15 direct integrations with the NeonCRM API, including Eventbrite, DonorSearch, MailChimp, QuickBooks, and WealthEngine. In addition, NeonCRM allows for online transactions through seven different gateways, including BluePay, IATS, Authorize.net, ACH Direct, and PayPal Pro, without additional transaction or processing fees. NeonCRM offers three tiers of pricing, with increasing access to external integrations, training, and support. Within each of these tiers, pricing increases with the number of records you need. The entry-level tier, Essentials, allows you to store up to 1,000 records and send up to 8,000 emails per month for \$600 per year, while the top tier, Empower, allows you to store up to 250,000 records and send up to two million emails per month for \$15,600 per year with enhanced support. All tiers allow access for unlimited staff members.

## Network for Good, by Network for Good

### Online hosted system

With a simplified interface and emphasis on fundraising best practices, Network for Good has positioned its donor management system as a solution that's easy to learn and simple to use for small nonprofits without experienced fundraising staff. The focus on simplicity extends throughout the system—the quick search will suggest donors and addresses as you type, and the donor profile does a good job of condensing contact information, giving history, and recent activity into a single screen. Recording a new gift is a straightforward process, aided by a minimum of required fields on the entry screen, and the interface is designed to readjust to browser size, allowing users to manage the system from a smartphone or tablet. There's no dedicated batch entry screen to manually record multiple gifts at once—for example, a pile of checks. Instead, the gift entry screen gives you the option to post one donation and



move right onto the next, or you can upload a spreadsheet. Generating emails, letters, or other acknowledgements using a template with merged fields is similarly straightforward—after selecting the list to mail, the system presents a preview of the merged text. Two default templates each for print and email acknowledgments come out of the box, with suggested text. Queries to find a list of donors can be built, saved, and exported in a single screen, and the system comes with a number of recommended filters built in. There are some notable areas of functionality missing, however. At this time, there's no support for recording and tracking pledges, and to reconcile your donations with accounting, you'll need to export a spreadsheet to manually import into your accounting software. Most notably, there is no traditional reporting functionality—users are expected to view the charts, graphs, and query results in the system, or export as a spreadsheet to manipulate the data outside the system. All pricing tiers include unlimited users and free phone, email, chat, and online support. Pricing starts at \$1,188 per year for base system and up to 1,000 donor records, up to \$5,988 per year for up to 25,000 records and all included functionality. For an additional fee—starting at \$120 per month—users can get on-demand access to a personal fundraising coach for help with fundraising ideas, creating campaign plans, and crafting communications.

## Nonprofit Manager, by Trail Blazer

### Installed onto Windows, Mac computers and Tablets

Trail Blazer's Nonprofit Manager is an installed package that will be of particular interest to organizations that need powerful options for querying, analyzing, and reporting on their data. An array of standard reports are available for your use, but unique among the systems we reviewed, Nonprofit Manager includes spreadsheet-like pivot table capabilities that let you quickly summarize the data in these reports by practically any columns you want. Email and mail-merge capabilities are also strong, with unlimited templates and powerful querying capabilities. Also useful is the system's ability to let you track event registrants and ticketing as well as details about volunteer capabilities and hours. However, Nonprofit Manager isn't as customizable to your nonprofit's needs as other systems in this report, as you're limited to a dozen text fields that can be renamed, but you can customize an unlimited number of attributes which help with segmenting your lists. Since we last reviewed the system in 2013, Nonprofit Manager has improved how it handles householding and relationships between donors—users now have the ability to link donor records together by custom relationship types. Trail Blazer Nonprofit Manager has a pricing structure calculated based on the amount of concurrent users as well as how many records in the system, starting at \$1,200 per year for up to five concurrent users and fewer than 2,500 donors, while an organization with fewer than 20,000 donor records would pay \$3,360. A one-time setup fee covers importing and converting your existing donor records, starting at \$295 for up to 5,000 donor records.

## Nonprofit Success Pack, by Salesforce Foundation

### Online hosted system

Salesforce offers one of the most flexible and powerful Cloud customer data platforms available. The Nonprofit Success Pack (NPSP) adapts the for-profit Salesforce system to nonprofit organization needs. For example, a system capability gets customized, such as the ability to create campaign lists that pull from standard nonprofit donor reports (such as LYBUNT and/or SYBUNT). Salesforce with the NPSP tracks several types of donations, including gifts, in-kind donations, grants, matching gifts, and membership. You can create nearly any type of query or report you want, because of the underlying Salesforce platform. And a refreshed user interface features a modern design, with more visual elements—including graphs and charts—available in the system. The Salesforce AppExchange ([appexchange.salesforce.com](https://appexchange.salesforce.com)) features hundreds of apps that add features that the NPSP lacks. For example, the default setup lacks online giving capabilities, accounting system integration, event management, and other modules. The AppExchange lists about 60 apps specifically marked for nonprofit use. As a sophisticated Cloud platform, Salesforce also provides an extreme degree of configurability: there's an entire developer platform with APIs and programming capabilities. The system may sometimes be a bit daunting to learn. Salesforce created Trailhead, a Cloud-based learning system designed to put users, admins, and developers on a path to mastery of the system (<https://trailhead>).



salesforce.com/). The NPSP is free to add to your Salesforce setup, but you'll need Salesforce licenses to use it. Any 501(c)3 may qualify, and Salesforce will provide your first 10 subscriptions free. Additional Lightning Enterprise Edition subscriptions cost \$432 per subscription per year. If you decide you'll need help, the Salesforce.org site lists several partners that will assist you for a fee.

## NPOconnect, by YourCause (formerly Orange Leap)

### Online hosted system

NPOconnect—formerly Orange Leap—is an online system with a clean interface and thoughtful functionality that would be useful for organizations that have outgrown the lighter-weight, lower-cost donor management systems, but aren't yet ready for the more expensive (and complicated) higher-end fundraising solutions. At sign-in, users are greeted with a dashboard of useful charts, graphs, and maps to summarize their fundraising trends, and the system provides several useful automation features to streamline tasks. The built-in business rules allow you to automatically schedule and assign asks based on custom categories for constituents, and receipts are automatically generated and emailed as you record gifts. NPOconnect is also strong in managing and scheduling out pledges with multiple equal installments, with automated reminder emails to remind donors of each upcoming payment, and donors with outstanding pledges are easily identified by the gold star icon on the top of their profile. NPOconnect is less capable for communicating with your constituents, however, as there is no broadcast email functionality in the system itself, and currently you can only create merged letters by exporting the list of recipients and merging in Microsoft Word or an equivalent word processor. Querying is accomplished either through an advanced search or, for more complicated searches, using the ad hoc report wizard and saving the filters to use in future searches or reports. Pricing for the system is a monthly subscription fee based on the number of constituent records, and includes unlimited users, support, and online training. An organization with fewer than 1,000 donors would pay \$2,388 per year, while an organization with up to 20,000 donors would pay \$4,788 per year.

## The Raiser's Edge NXT, by Blackbaud

### Online hosted system

The Raiser's Edge NXT by Blackbaud is the next generation of the well-established and sophisticated donor management tool, The Raiser's Edge. The Raiser's Edge NXT is accessible online through a new Cloud platform with a modern user interface built for front-line fundraisers. Upon sign-in, users are greeted by the Work Center, which brings together tasks, new donors, and other actions that need attention, which are automatically tagged to constituent records. From here you can easily find a donor's profile through the new global search. The donor profile has received a facelift as well, with giving history, contact information, and the log of all actions or communications with a donor organized as tiles, making it easier to find important information from a mobile device than with the classic, tab-based interface. Householding and relationship management in The Raiser's Edge NXT are also improved, as you can now manage multiple "relationship types" in the web view to define and view both family and professional connections.

Unlike The Raiser's Edge, The Raiser's Edge NXT now includes online donation forms, payment processing, and email marketing capabilities out-of-the-box, through Blackbaud's Online Express, allowing users to manage their email fundraising and online donations without Blackbaud's more powerful and expensive NetCommunity product. Gift- and pledge-tracking is very robust, and email acknowledgements and receipts are automatically generated using built-in rules to use different templates based on the donor's history and importance to the organization. However, in order to record new donations, you'll need to toggle from this interface to "Database View," a version of the classic Raiser's Edge system—the vendor reports that a redesigned gift entry interface will be available in the first half of 2017.

Querying and reporting continue to be strong, albeit more complicated than with many of the lower-cost systems in this report. The new “Insights” functionality allows users to easily create new ad hoc reports and queries through a drag-and-drop report builder within the new online interface. The options to add charts or graphs to a new report are prominent, and reports and graphs can be easily added to the user dashboard. Dashboards can be defined by user role or focus area, allowing staff to configure the system to their particular needs, and you can easily drill down on report results and graphs for more detail, all from the new online interface, which would be useful for executives and board members to quickly check in on fundraising statistics. In addition, saved reports and queries can be used to create custom alerts, allowing particular users to be notified or assigned tasks based on campaign performance, for example. The system also comes with many best practice reports and dashboards that are relatively straightforward to tailor to an organization’s specific needs.

Accounting is tightly integrated if you use Blackbaud’s solution, The Financial Edge, allowing users to post batches to accounting with a single click—however, you’ll need to toggle over to the classic “Database View” to do so. There are fewer options for customizing the system to your specific needs than in other systems reviewed in this report—each donor record comes with a number of customizable attributes, which receive their own tile in the Work Center view, and their own tab in the classic view—and there’s no ability to create custom objects in the system. The vendor reports that a new REST API for the system will be available by late 2017, which will allow users, with a developer’s help, to build dynamic connections with third-party solutions in order to expand system functionality.

Out-of-the-box, The Raiser’s Edge NXT allows you to track non-donor constituents as “non-constituent records,” which are included in searches and reports like typical donor records. A number of optional modules are available that provide more sophisticated support for volunteers, membership management, event registration, alumni management, and tracking grant proposals or planned giving. Unlike in The Raiser’s Edge, where additional modules could be purchased à la carte, modules are available as part of the subscription packages. The Essentials plan, starting at \$6,000 per year, includes your choice of one of these modules; for all the modules, you’ll need the Pro plan, which starts at \$9,000 per year.

Additionally, the system comes with useful tools for data hygiene and data appending, including a built-in wealth screening functionality to identify donor giving capacity, and a National Change of Address integration, which automatically checks donor contact information against the USPS database. These features, combined with the new task management and workflow features of the Work Center, make The Raiser’s Edge NXT an attractive option for fundraisers focused on identifying and cultivating major donor prospects.

Pricing for the system is determined by the package you choose and the number of donor records stored, and includes unlimited users, training videos, and online chat support. An organization with up to 2,500 donor records would pay \$4,000 per year for the Starter package, with a one-time implementation fee of \$2,000 to \$5,000 depending on whether the implementation is done by Blackbaud or third-party consultants. A larger organization with up to 25,000 records could expect to pay \$10,000 per year for the Essentials package, which includes the choice of one additional module, with a one-time implementation fee of \$5,000 to \$10,000. Implementation and conversion can be purchased through Blackbaud or third parties, and price will vary based on the system complexity and data needs.

## ResultsPlus, by Metafile

### Installed on Windows computers or Online hosted system

ResultsPlus, from Metafile, will look familiar to anyone who has used Microsoft Office products: ResultsPlus displays menu options in a bar across the top with a mix of icons, text, and drop-down options, while donor data tables and details appear below. The system supports both individual and batch entry of gifts, and can attribute a gift to either an individual or a household. It also allows you to add and customize several fields. ResultsPlus offers a variety of ways to get data into and out of the system. Scan a barcode on a donor form for quick data entry. Pull in online donation data from ResultsPlus partners or third-party payment systems with an import. Export and custom-

ize acknowledgement letters as needed with Microsoft Word, and send financial data to QuickBooks, among others. The system includes more than 250 standard reports, which you can schedule: select a report, set a recurring time, and ResultsPlus will run the report and email it to people automatically. To create a new report, a solid understanding of SQL queries helps. The hosted version includes a few features offered as add-ons to the installed version. For example, the project management module handles event registrations, task assignments, and sponsorship details. And document archival lets you store and search file attachments, such as acknowledgement letters or proposals. The installed version costs more as the number of records and users increase. ResultsPlus Standard Ultra-Lite System caps the number of records at 1,500 for \$1,000, while a ResultsPlus Platinum 3-user installation supports an unlimited number of records for \$8,500. Support for the installed version is available for an additional fee. The hosted version includes support and costs \$157 per user per month for full access. Additional limited-access user accounts are available at a lower monthly cost per user.

## Salsa CRM, by Salsa Labs

### Online hosted system

In October 2015, Salsa Labs merged with DonorPro, rebranded the product as Salsa CRM, and developed single sign-on integration with the company's Salsa Engage product to extend and enhance the online fundraising and constituent engagement capabilities of the system. As we noted in our 2013 review, the system has strong functionality in every category, and is particularly strong in support for pledges, accounting controls, mail-merging, and reporting (it includes a very nice ad hoc report writer as well as standard reports and the ability to generate cultivation and forecasting reports). The integration with Salsa Engage has brought significant improvements to email marketing and online donations, and gives customers access to peer-to-peer fundraising and advocacy add-on modules. Much of Salsa Engage's functionality is driven by a series of user-friendly wizards, but the visual interface and navigation is very different from the CRM, which may be confusing to novice users. Salsa CRM's user interface is optimized for mobile and is quite usable, with a particularly friendly tool for generating queries and sophisticated capabilities around batch gift entry, including a nice check-scanning module. The system has powerful quick search capability, including phonetic searching to compensate for spelling errors, and this capability now includes searching for data in custom fields. Included modules provide support for events and membership management. In addition, the system provides functionality for human resources functions, inventory management, and patient services, which will be of particular interest to those in the health and human services sector. The company charges a flat monthly fee plus a per-constituent record charge for unlimited users and seats to access all features, functions, and modules. The yearly cost for an organization with 1,000 constituents would be \$2,699, while the yearly cost for an organization with 20,000 constituents would be \$4,968.

## Sumac, by Sumac

### Installed on Windows computers or Online hosted system

While many systems have moved to navigation schemes built around complex menu systems, Sumac pointedly bucks this trend and embraces simplicity. Upon startup, Sumac greets the user with a basic menu of well-labeled buttons that leave no doubt as to how to get started. This straightforward approach carries through most areas of the system's basic functions, like working with donors and gifts, setting pledges, online donations, and setting up one-off "thank you" letters, all of which Sumac handles competently. The basic donor overview, however, could feel cluttered rather than well organized depending on how many modules are installed—this could be an issue in particular for organizations that want to track a lot of different types of things about each constituent. Reporting support is strong with many useful standard reports, although there is no central location to access all reports—instead the relevant reports are listed in each section of the system. The querying functionality is powerful, assisted by a unique visual guide that shows users the number of constituents that will be found by each piece of their complex query before the query is run. Sumac can automatically record accounting information for transactions using the built-in Ledger Entries feature, which can be used to either create reports within the system or exported to a separate accounting

tool—transaction reports can be imported directly to QuickBooks with a single click, while you'll need to export and manually import the information into other accounting packages. The system supports broadcast emailing and includes basic delivery reports; messages are sent through the client's servers, potentially exposing them to blacklisting, or they can be exported to a third-party broadcast email client. Because the system is set up around a core set of functionality that is extended by 19 add-on modules, different types of organizations can customize the functionality of the system to meet their specific needs. Pricing for the system depends on the number of users, donor records, and how many add-ons you have selected. Pricing starts at \$240 per year for the Silver package, including one user, 1,000 records, and choice of any two add-on modules; Sumac Platinum starts at \$4,800 per year for unlimited users, unlimited records, and choice of any five add-on modules. Support is included in the price. For organizations with minimal needs and fewer than 500 donor records, or those looking to try out the system, Sumac also offers a free basic version of the system. While Sumac is an installed system, for an additional \$25 per month, Sumac Cloud allows you to access your database on a Cloud-based server.

## Sustain Fundraising Management Software, by Sustain, LLC

### Installed on Windows computers or Online hosted system

Sustain Fundraising Management Software provides a donor management solution intended to help a small fundraising office complete most tasks within the program. For example, follow a web link from within a constituent record, and the page opens inside a new frame within the program. And Sustain tracks not only constituent and donor data, but also grant and volunteer data. Each donor record in Sustain contains information for two people: Person 1 and Person 2. The system supports addressing communication to each person, and can record gifts as being from either person or both. (This record structure meets the needs of many small to mid-sized schools, which comprise a significant percentage of the company's customers.) You may also add "attributes" fields to track custom data. The system includes a dynamic list builder, known as Letters, Labels, and Emails. You specify search criteria and records that match in one column. Add one, some, or all of these constituents to your list and the names show in a second column. A third column displays blocked records, which are records that meet the criteria, but won't be included in your list—typically because they lack information (e.g., no email or mailing address) or are otherwise excluded (e.g., do not mail). Sustain Fundraising Management Software may be purchased and installed, or subscribed to as a hosted service. Prices increase with the number of records stored, but hosted pricing includes support. For the hosted option, store up to 1,000 records for \$600 per year, plus a one-time setup fee of \$250. For the installed option, store up to 1,000 records for a one-time fee of \$750 plus \$500 for annual support; the 25,000 record version costs a one-time fee of \$5,500 plus \$1,500 for annual support.

## Talisma Fundraising Online, a Campus Management Solution

### Online hosted system

Talisma Fundraising offers powerful fundraising capabilities with an emphasis on support for the needs of higher education, with the option to support additional constituents and fundraising methods (such as major gifts, planned giving, events, and membership) through add-on modules. Users are presented with a number of useful and commonly used functions on the home screen, including favorite reports, saved queries, and frequently-accessed or favorite donor records, although at times the home screen can feel crowded. The system comes with a large amount of useful standard reports, powered by Crystal Reports, and the process for creating a custom or ad hoc report is simplified with a minimum of steps through a straightforward report-building wizard. While gifts and pledges are straightforward to enter, especially through the batch gift interface, and the system can automatically generate reminder emails or letters for donors of their pledges, the system doesn't automatically notify users of outstanding or overdue pledges. Since we last reviewed Talisma in 2013, the vendor has added support for broadcast emails through a two-way integration with Constant Contact, allowing you to generate emails and view delivery statistics like click-through, open, or bounce rates directly within the system. Additional modules exist that provide support for online donations, robust member, volunteer, and event management among others. Accounting is supported through a



robust integration with Microsoft Dynamics GP (formerly Great Plains)—for other accounting solutions, you'll need to export the transactions in a text file. Pricing for the system depends on the number of users and additional modules, and all levels require a three-year contract, which includes the software license, hosting, support, and maintenance. An organization with a single named user and unlimited donor records would expect to pay \$1,872 per year; for three users, an organization would expect to pay \$3,360 per year.

## Total Community Manager, by Unger & Associates, LLC

### Online hosted system or Installed on Windows computers

Total Community Manager, by Unger & Associates, LLC, tracks donor, campaign, membership, volunteer, and event data in a conventional interface that presents data organized by tabs, forms, and tables. The system stores information about each individual in a separate record, which you may link to other records—individual or organization records—to track relationships. There are no limits on the number of contact records associated with contacts. Because of the tab-and-table interface, you may mouse-and-click a bit to get a comprehensive view of a contact, although you may also view all contact information in a comprehensive multi-page document with a built-in report. Donations may be entered individually or in batches through the quick entry interface, and pledge payments may be recorded and applied to outstanding pledges. The system supports importing of online donation data, and exporting of gift data for financial systems. Total Community Manager comes with about 20 reports, and another 100 or so reports are available to download from an online library. A unique strength of the system may be the optional Land Trust Manager module, which allows an organization to track property management information in a central spot. Total Community Manager can track site visits, photos, agreements, and all documentation necessary to maintain Land Trust accreditation. And the system can display selected households on a Google Map. Because of this, a large number of the system's users are Land Trust organizations. Both the installed and hosted version of Total Community Manager support two concurrent users, with the installed version starting at \$695 (one-time cost), and the hosted version starting at \$849 per year, with an additional setup fee for the hosted version. Optional upgrades allow for more users, third-party integrations (such as Constant Contact), training, support, and additional modules.

## Total Info, by Easy-Ware

### Installed on a local server and available on Windows or Mac computers

Total Info, from Easy-Ware, handles donor management combined with optional class/camp management and/or a full box office solution. The solution also supports online subscription sales, event registrations, class registration, and membership sales. There is a standalone concessions point of sale with support for cash drawers and receipt printers. As a result, many Easy-Ware customers are performing arts organizations, art house cinemas, film festivals, and membership organizations. Total Info tracks information about each family member, and supports an unlimited number of custom fields. It includes many standard reports, a custom report tool, and a built-in word processor with mail-merge capabilities. And customers can buy tickets or subscriptions and donate online in a single transaction. Total Info also offers automation. For example, a theater can schedule both an email reminder to be sent a few days before a performance to all ticket holders, and a separate email sent only to non-subscribers after the show. SendGrid handles email from the system, and Total Info also connects to Constant Contact, MailChimp, and other email providers. However, some information from those systems, such as unsubscribe requests, does not automatically sync back to Total Info. Visually, Total Info screens are information-dense: it's a power-user's interface. On many layouts, the design does little to distinguish between information of primary and secondary importance. The standard version of Total Info costs a one-time fee of \$995 for one user, \$1,995 for two, or \$2,995 for three or more users, plus a maintenance fee of \$480 per year. The annual maintenance fee includes unlimited phone and email support. Total Info must be installed on a desktop or server, so you'll need to factor in hardware costs as well. Optional modules to add online ticketing, concessions point of sale, volunteer management, dynamic pricing, and more, cost an additional one-time cost that ranges from \$350 to \$795 per module.



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# **REVIEWS OF THE BEST VALUE SHORTLIST DONOR MANAGEMENT SYSTEMS**

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# BLOOMERANG, BY BLOOMERANG

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Bloomerang focuses on donor retention. The Cloud-based system displays donor retention data on login and features an “engagement indicator” on each constituent page, with a score calculated from the constituent’s activity (including constituent Tweets). To help you craft easy-to-understand, donor-centric communications, the built-in word processor offers an “Ahern audit” that calculates both the ratio of “I/we” words to “you/your” words in a letter and a reading level analysis. Bloomerang relies on visual design to help move data through the system. Web form templates for online giving, event registration, email sign-up, volunteer activity, and more, make it easy to bring data into the system. A vertical timeline of activity, with icons for different types of tasks, makes donor activities quickly viewable. A reporting tool with “include” or “exclude” selectors makes the impact of changes visible, since results display below. The system doesn’t include every feature. You can merge and print letters, but you’ll need to export, merge, and print labels manually. You can track pledges, but must enter irregular pledge payment schedules manually. By request and for a fee, Bloomerang will update records with current USPS data and provide a list of changes made. Other optional integrations add features and cost: DonorSearch brings in wealth information, Qgiv adds peer-to-peer fundraising, and Aplos syncs accounting data in real-time. Bloomerang offers the system at five price points based on the number of records. Pricing begins at 1,000 records and 5,000 emails per month for \$1,188 per year. A version for up to 25,000 records and 125,000 emails per month costs \$4,788 per year. All versions allow unlimited online giving pages/forms, an unlimited number of users, and free email/chat support and group training. Unlimited phone support, plus an hour of personalized training each year, costs extra.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$1,188
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$1,188
- **Pricing:** First year (Three users, 20,000 donors) \$4,788
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$4,788

## Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches name, email, and address fields. It includes a fuzzy logic search, so that correct spelling isn’t critical.
- **Quick Search on Custom Fields:** Cannot find a constituent by searching data entered into custom fields. (However, you can create a new report, add any field, and the results show up without having to save the report.)
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people that match an algorithm based on name and address fields.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. From a constituent profile, choose “New Donation” from a drop-down menu, then enter gift information.
- **Batching Gifts:** The system does not group donations into batches for reconciliation with accounting systems.
- **Gift Quick Entry Interface:** Does not provide a streamlined quick data entry interface within the system, although gift data can be imported.
- **Updating Donor Info via Quick Entry:** There is no quick data entry interface.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.

- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. If pledges are not periodic (e.g., monthly, yearly, etc.), then each pledge must be entered by hand, as opposed to generated based on a payment schedule.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.
- **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified.
- **Matching Gifts:** Matching gifts are entered as pledges against the employer's organization record with a soft credit on the original donor. This allows for the nonprofit to continue to follow up with unfulfilled matching gifts.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund, but you cannot split the gift across multiples of these without entering it as multiple separate donations.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like with custom fields and/or soft credits.
- **Gift Notes:** The system lets you add free-form notes to a gift. These notes can be queried and reported on.
- **Attaching Documents to Gift or Activity Record:** The system does not let you upload and attach documents to gifts, activities, and/or proposals. (Note: Document attachment feature planned for release in early 2017, but not available at time of demo.)
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Stock Gifts:** The system can track both the unsold and sold values of stock gifts with custom fields.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, and in-kind or other gifts.
- **Gifts "In Honor Of" and Tributes:** Lets you track gifts given "in honor of" and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.
- **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.
- **Premiums:** Lets you assign and track premiums and record tax deductible amount, but amounts must be manually entered for each gift.

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, "office" and "cell phone"), mark the primary number and address, and track the donors' preferred contact method.
- **Multiple Addresses:** Does not let you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Must manually set a primary address for each constituent. No automatic seasonal address adjustment available.
- **Do Not Contact:** Lets you mark that a particular person should not be contacted, but staff must check a particular field to see it. Constituent record may also be set to "inactive" status.
- **Relationships Between Donors:** Lets you track relationships between donors and label them (for example, "family member," "co-worker") with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way ("would like to meet"), two-way ("spouse"), or directional ("boss"; "works for..."), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Householding:** A database record describes a single individual and all their contact information and actions. In addition, each individual may be part of a household. For each family, you define the head of the household who will receive mailings. You can see individual giving and other household members on individual profile, but must create a query to see a total of household giving.
- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship by using custom fields.

- **Donor Notes:** A large text area lets you enter and view free-form notes about donors.
- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings by adding notes or tasks. Manual communication logs may be included in system queries and reports.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters and emails for each donor. The company plans to add the ability to track email sent outside the system—by bcc-ing a unique system email address on emails—in early 2017, but the feature was not available at time of demo.
- **Donor Dashboard:** Lets you easily see all communications and donor actions on one screen, with a vertically displayed activity timeline.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.
- **Donor Source:** Lets you track the source of a particular donor.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.
- **Online Integrated Data Cleaning and Appending:** No functionality for online integrated data cleaning and appending. By request and for a fee, Bloomerang will update records with current USPS data, and provide customer a list of changes made.
- **Mobile Support:** Lets you access constituent records and run reports from mobile device web browsers.
- **Attaching Documents to Donor Record:** The system does not let you upload and attach documents to donor records. Document upload feature planned for release in early 2017, but not available at time of demo.
- **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor's social media links to fields in the donor record for Twitter, Facebook, and LinkedIn.
- **Ability to Track Donor Social Media Activities in the System:** Constituent social media activity on Twitter may be automatically tracked and viewed from the constituent's Timeline.

## Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow using custom fields.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date, and shows the reminder prominently on the homepage along with what is overdue, due, and other filters.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.
- **Donor Research:** Automatically matches donor information to outside resources in order to provide more information on giving capability and priority via a partnership with DonorSearch.
- **Supporter Profiles for Prospecting:** Prominently displays an “Engagement” indicator, which is calculated based on constituent activity tracked in the system. (Constituents are scored from Cold, Cool, Warm, Hot, and On-Fire.)
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts, with notes, tasks, or custom fields.
- **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by running a report.
- **Proposal Tracking:** Lets you track what proposals are due, what you've submitted, and what has already been approved by a particular foundation. With custom fields, this functionality may be very detailed and include likelihood, links to supporting docs, dates for a site visit, and many other fields.
- **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest with custom fields.
- **Grant Tracking and Reporting:** Lets you track and report on grants via custom fields.
- **Thresholds and Action Triggers:** No special functionality to support thresholds and action triggers.

## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates within the system, and then mail-merge to them without the need for any other system.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac using the system's built-in word processor, which generates merged letters in PDF format.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates with complete control over layout, formats, logos, and images using their built-in word processor.
- **Personalizing Letters:** Does not let you view and customize individual letters before printing them.
- **Tracking that Letters Were Sent:** Automatically logs for each donor a copy of the letter sent (in PDF format).
- **One-off Thank Yous:** Cannot print a single thank you letter from the gift entry interface; all thank you letters must be created in a batch process.
- **Batch Processing of Thank Yous:** Automatically creates a queue of people to be thanked as part of the gift entry process. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor's previous giving history.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Printing Labels:** After you print out letters, you must navigate to a different interface to print out labels for that mailing. The built-in word processor does not support envelopes or labels, so you'll need to export a CSV file to merge by hand, for instance, with Word.

## Emailing

- **One-Off Email:** Click the donor's email address in the header to send email from the user's email client. With automatic email integration (i.e., bcc: Bloomerang), emails can be recorded as interactions on the timeline.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Merging Data into Emails:** The system uses a similar process for merge-to-email as it does for printed letters, with a few additional email options (e.g., specify from/to address, embed video, etc.).
- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor's previous giving history, but no conditional or calculated fields available.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails:** Cannot schedule email to send in the future. Bloomerang indicated this feature is on the roadmap for 2017 release.
- **Email Server:** Emails are sent via integrated mail services from SendGrid, protecting you from blacklisting; SendGrid takes measures to ensure email goes to donors' inboxes rather than their spam filters.
- **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization.
- **Email Reports:** Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addresses that didn't go through.
- **Automatic Emails:** Lets you set up automatic emails based on certain events, like a web form submission (for a donation or volunteer or event registration).



## Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters to select data to include, as well as data to exclude. Results displayed below the query in process.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the filters and criteria from your saved query. This is all done on one screen, reducing the complexity.
- **Saving Queries:** Lets you save queries to be run again later. All saved queries are available to all users.
- **Taking Actions on a List:** In the system you first choose the action (e.g., mail or email), then select your list. Once you have created a list, you can view the list on screen, save the list, or export the data.
- **Packaged Queries:** The system includes several packaged filter sets.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT). However, they offer few standard reports compared to other reviewed systems - the system is designed to allow most reports to be built by the user. Bloomerang will help create key reports during setup.
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** Can create basic ad hoc reports by choosing what columns you want to include, and adding groups or totals.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within ad hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Does not meet this criteria. Shows recent reports or list of all reports.
- **Exporting Reports:** Lets you export reports to Excel format.
- **Distinguishing Reports:** Bloomerang focuses on donor retention efforts.
- **Custom Reports:** Lets you create custom reports through a reports wizard.
- **Graphical Capabilities:** Does not let you add charts and graphs to reports. Must export data for use in third-party programs.
- **Dashboard Placement:** Does not let you add reports to the dashboard, although recently viewed reports display. Dashboard displays the current donor retention rate, campaign progress, and weekly/monthly/yearly giving totals.
- **Scheduled Reports:** Does not offer scheduled reports.
- **Reporting Triggers:** Does not offer reports triggered by set criteria.

## Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors’ credit cards within the system.
- **Processing Fees:** Only processing fees are those charged by the third-party vendor.

- **Recurring Gifts:** Lets you set up recurring gifts, which are both logged and charged to donors' credit cards at designated intervals.
- **Web Sign-Up Form:** Web forms can be customized and branded by client, but HTML skills required for customized CSS editing.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database.
- **De-Duping Online Actions:** The submitted donor's email address, name, telephone number, and address are reviewed for possible duplicates. If a likely match, the data is merged with the existing record.
- **Event Registration:** Lets you accept online registration fees for events, although the event registration functionality is basic.
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.
- **Distributed/Team Fundraising:** The system integrates with Qgiv for peer-to-peer fundraising campaign support.
- **Membership Dues:** Bloomerang can process a membership transaction online, but does not offer a membership portal for members to renew membership dues online.
- **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart. However, event ticket purchases limited to single ticket level at a time.
- **Payment Form Customization:** Vendor provides an online payment form, which can be customized to completely match your website.
- **Required Fields:** The system requires a name, street address, email, and credit card information to process a transaction. (If information entered within the app, only credit card number and expiration date are required.)
- **Transaction Fees:** Vendor does not charge a transaction fee for each payment. Transaction fees are charged by Stripe or BluePay.
- **Refunds:** Lets you easily issue refunds through the system.
- **Mobile Giving:** All forms support mobile phones.
- **Self Management of Donor Record:** Does not allow donors to manage their own records.

## Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid, by adding additional fields to a form.
- **Table Details:** Cannot manage any table details for an event, such as names of table captains, seating arrangements, or the amount of gifts raised per table, except by using custom fields.
- **Nametags:** Lets you easily create nametags for an event via segmentation and export-to-CSV to merge with an external app, such as Microsoft Word.
- **On-Site Registration:** Does not provide any specific functionality to support on-site registration.
- **Volunteer Interests:** Lets you track a detailed profile of someone's interests and aptitudes, but only with custom fields.
- **Volunteer Work Tracking:** May track volunteer activity with custom fields and reports.
- **Membership Tracking:** Does not provide any specific functionality to track member levels, payments, and expiration dates, except through custom fields.
- **Peer-to-Peer Fundraising:** The system integrates with Qgiv for peer-to-peer fundraising campaign support. Soft credits can also be created to track the relationship between the funder and the fundraiser in Bloomerang (in addition to Qgiv). If a different tool is used, peer-to-peer relationships can be tracked using a combination of Bloomerang's standard soft credit and relationship functionality.
- **Other Interactions:** Custom fields allow additional customization.

## Accounting Support

- **Existing Integrations:** Lets you create a file format tailored to upload easily into QuickBooks (installed version only). Also offers live, online integration with Aplos.
- **Approach to Batching:** With the Bloomerang/Aplos integration, each transaction entered in Bloomerang is automatically pushed to Aplos.
- **Reconciling a Batch:** Upon a successful sync, the gift record displays “Linked.”
- **Controlling Reconciled Donations:** Once the entry is reconciled with bank records in Aplos, the gift in Bloomerang displays “Reconciled.”

## Permissions

- **Permissions:** The system has two levels of permissions: Admin and Standard User. Standard Users may not make changes to the structure of the database.
- **Field Level Permissions:** Cannot define user or group permissions on a field-by-field basis.

## Customization

- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships and many others.
- **Custom Fields:** Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields:** Cannot rename existing fields.
- **Moving or Deleting Fields:** Cannot move or delete existing fields.
- **Custom Constituent Interactions:** Cannot create custom interactions.
- **Vendor Customization:** Vendor does not customize the system.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality.

## Integration

- **Existing Integrations:** System integrates with QuickBooks, Aplos, Qgiv, Fundly, and Firespring at no extra charge. Integration with DonorSearch available for a fee.
- **Data Export:** Lets you export all data visible to users into .XLSX format.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Access to API:** The vendor allows API access (see <https://bloomerang.co/features/integrations/api/>).
- **Third-Party Automation Support:** The system does not come with configured support for end-user automation, such as IFTTT or Zapier.

## Ease of Use

- **Ease of Use for Novices:** Easy. The system is carefully designed to be free of clutter and easy to understand.
- **Role-Based Interfaces:** Other than custom fields and dashboard settings, you cannot substantially alter the order and layout of data.
- **Speed for Expert Users:** Easy. Once you have mastered the system, it becomes quite quick to use. Terminology is easy to understand, and the system provides a fair amount of functionality to optimize time-consuming tasks, like data entry.

## Support and Training

- **Training:** Live online courses are available through the Bloomerang Academy, which provides Basic, Intermediate, and Advanced training at no cost.
- **Manuals and Documentation:** Vendor provides a complete online knowledge base of text and video documentation.
- **Support:** Vendor provides chat and email support. Phone support available at additional cost.
- **Roadmap for Planned Upgrades:** Roadmap shared at annual conference, BloomCon (typically in February).
- **User Communities:** Customer community available in FreshDesk, which includes support documentation and a video library.
- **Social Support:** Active on Facebook, Instagram, LinkedIn, and Twitter.

## Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

## Product Background

- **History:** Vendor has been in business since 2012; the system has been publicly available since 2012.
- **Clients:** Vendor reports more than 2,000 clients.
- **Sustainability:** Vendor reports that the revenue earned from this product covers the personnel and operational expenses required to support it.

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# CIVICRM, BY CIVICRM LLC

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CiviCRM provides an open source web-based system to help nonprofit organizations organize constituent information, handle donations and memberships, and engage communities. The system manages gifts, pledges, memberships, constituent information, and reporting solidly. CiviCRM aligns well with the values many nonprofit organizations hold. It's free to use, and the code is free to study and share. You can download and deploy CiviCRM and configure it to work with your Drupal, Wordpress, or Joomla! website. If you're technically skilled, you're free to improve the code, then share your changes with the community. CiviCRM bundles functionality into components and extensions that you can enable and add as desired. Components deliver major features: CiviContribute handles donations, CiviMail delivers email newsletters, CiviEvent offers registration and event management, and CiviCampaign tracks progress toward goals across several component modules. Other modules assist with grants, volunteers, and case management. Extensions enhance functionality, but more narrowly than components. For example, an extended reports extension expands reporting options, a MailChimp CiviCRM Integration extension keeps email lists in sync, and an iATS Payments extension offers a variety of online payment options. A core team of six developers, one project manager, and a community of around 100 individual contributors builds and maintains the CiviCRM project, components, and extensions. As such, the rate of development—of the core, of components, and of extensions—varies. When one component gets a user interface update, others might not. This can produce a less-consistent user experience than might be desired. While there's no fee for the CiviCRM software, the system does require a web server and a web Content Management System. You'll also likely need to budget for an email provider and a payment processor to handle donations. If you need technical assistance with the system, CiviCRM.org maintains a list of partners that provide consulting, development, or hosting services.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$0
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$0
- **Pricing:** First year (Three users, 20,000 donors) \$0
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$0

## Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches first name, last name, address, constituent ID, or social security number.
- **Quick Search on Custom Fields:** Lets you find a person by searching data entered into custom fields.
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name, maiden name, or contact information. Names are matched on “name classes” (which would identify Judith Smith and Judy Smith as potential duplicates) as well as identical names. The system prevents duplicate entries based on fields other than name (e.g., email address, organization).
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts:** For ease of reconciling with accounting systems, donations may be entered as part of a batch by adding a batch name. Batches are reconciled by matching the control amount with the “actual” amount for the system to post.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface.



- **Updating Donor Info via Quick Entry:** The quick entry interface lets you update, but not create, donor contact information.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges:** The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.
- **Reminders for Pledges:** Can flexibly configure the system to notify the appropriate staff member(s) with a reminder or via email when a pledge is near due.
- **Matching Gifts:** Cannot easily track matching gifts that need to be claimed from employers. Matching gifts can be tracked and included in reports.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund, or split the gift across multiples of these.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Gift Notes:** The system lets you add free-form notes to a gift. These notes can be queried and reported on.
- **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database. This requires configuration.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Stock Gifts:** By default, the system does not track stock gifts. But it could be customized to do so.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of” and tributes. Can designate honorees and set notifications for honorees and donors.
- **Zero Dollar Donations:** The system cannot track the value of goods, services, or other zero dollar donations.
- **Premiums:** Lets you assign and track premiums and record tax deductible amount.

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Seasonal addresses are tracked only as “other addresses.”
- **Do Not Contact:** Lets you display an optional, prominent message as a pop-up on the donor screen to notify staff that a particular person should not be contacted. Alternatively you can see this information on the donor screen. Donors can specify alternate or preferred methods of contact, if applicable.
- **Relationships Between Donors:** Lets you track relationships between donors and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”), or directional (“boss”; works for...), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships.
- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.
- **Donor Notes:** Lets you query and report on free-form notes about donors.

- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings. Manual communication logs are included in system queries and reports.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters and emails for each donor.
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving. You can configure this screen to choose the lists and aggregate stats that are most useful to you.
- **Donor Source:** Lets you track the source of a particular donor.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.
- **Online Integrated Data Cleaning and Appending:** Integrates with USPS for address validation.
- **Mobile Support:** Lets you access constituent records from mobiles via a mobile web browser. The system is not customized for mobile web browsers.
- **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.
- **Ability to Track/Integrate Social Media Information with Donor Record:** No ability to track social media information with the donor record.
- **Ability to Track Donor Social Media Activities in the System:** Does not meet this criteria.

## Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You can also create your own custom stages and track a donor's progression through them, with associated dates, with CiviCase.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date with CiviCase that shows the reminder on-screen at the appropriate time.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date with CiviCase.
- **Donor Research:** Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority.
- **Supporter Profiles for Prospecting:** Contacts can be grouped intelligently via various parameters (contributions, activities, events, etc.), and move in and out of groups based on engagement. In this way, groups become prospecting channels and stay up to date.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.
- **Proposal Tracking:** Lets you track what proposals are due with the CiviCase module.
- **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest, through custom fields.
- **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts.
- **Thresholds and Action Triggers:** No special functionality to support thresholds and action triggers.

## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates within the system that include mail-merged information.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac. As all letters are mail merged through the server, it doesn't matter what operating system is running on the desktop computer.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates with complete control over layout, formats, logos, and images using their built-in word processor.
- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking that Letters Were Sent:** Automatically logs for each donor that a letter was sent.
- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous:** Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings:** Cannot create letters that include custom gift strings based on a donor's previous giving history.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Printing Labels:** Lets you easily print labels for a set of people from the same query result page used to print letters.

## Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and "mail merge" type inserted data.
- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor's previous giving history. This customization requires the use of Smart APIs, which requires some technical understanding.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails:** Lets you schedule email to send in the future.
- **Email Server:** The system can be configured either to use your own email server or that of an email vendor you choose.
- **Unsubscribes:** Email recipients can unsubscribe either via a weblink or directly from the email. Senders can control these unsubscribe tokens to offer list unsubscribe, all list unsubscribe, or both.
- **Email Reports:** Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addresses that didn't go through. The optional CiviVisualize extension can provide graphical views of the data.
- **Automatic Emails:** Lets you set up automatic emails based on certain events, like a web form submission.

## Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also write your own SQL queries if you like.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.
- **Packaged Queries:** Includes the package queries underlying the standard reports.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT). However, they offer few standard reports compared to other reviewed systems—the system is designed to allow most reports to be built by the user.
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** With sufficient technical skill, you can create any ad hoc report desired from the data in the system.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within ad hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to CSV or Excel, as well as other formats.
- **Distinguishing Reports:** The distinguishing report feature is the ability to access and report on any data in the system.
- **Custom Reports:** Lets you create custom reports by modifying either existing reports or templates.
- **Graphical Capabilities:** The system lets you add a wide variety of charts and graphs to reports.
- **Dashboard Placement:** Dashboards can include reports in list or graph format based on individual reports. Dashboards are updated by selecting or removing report widgets. Report widgets update asynchronously based on the reports. Changes to the dashboard widgets are done by modifying the report itself.
- **Scheduled Reports:** Reports can be triggered via scheduled tasks (via cron jobs) and sent to unique email recipients or groups. Reports can be contained within the body of the email or sent as an attachment.
- **Reporting Triggers:** An optional CiviRules extension can be used to trigger various events based on user defined rules.

## Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors’ credit cards within the system.
- **Processing Fees:** CiviCRM itself has no processing fees. All fees will be directly associated with the processor used.

- **Recurring Gifts:** Lets you set up recurring gifts, which are both logged and charged to donors' credit cards at designated intervals.
- **Web Sign-Up Form:** People can easily sign up for your email list via an integrated sign-up form on your website. Web forms can be customized and branded by clients via WYSIWYG editor, but HTML skills are required for detailed branding and navigation customization.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database.
- **De-Duping Online Actions:** Online sign-ups or payments are logged to donors' existing payment records by name or email address.
- **Event Registration:** Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket, meal options, assigned seating, etc.).
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.
- **Distributed/Team Fundraising:** Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.
- **Membership Dues:** Lets members pay membership dues online.
- **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart.
- **Payment Form Customization:** Vendor provides an online payment form that can be customized to completely match your website.
- **Required Fields:** Varies depending on the selected payment processor. Could be as few as an email address, amount, and required credit card data. By default, when the organization runs a card on behalf of a donor, the system requires billing address information.
- **Transaction Fees:** You will need to set up your own merchant account, which will entail additional transaction fees.
- **Refunds:** You must issue refunds through the merchant account, and then log the refund into the system manually.
- **Mobile Giving:** Can access the donor portal via mobile phones.
- **Self Management of Donor Record:** Lets donors manage their own contact information online.

## Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details:** Cannot manage any table details for an event, such as names of table captains, seating arrangements, or the amount of gifts raised per table, except by using custom fields.
- **Nametags:** Lets you create nametags for an event via a standard mail merge process.
- **On-Site Registration:** Provides on-site registration via the CiviSCAN iPhone app.
- **Volunteer Interests:** CiviVolunteer lets you track a detailed profile of someone's interests and aptitudes, including several different types of information, in order to match volunteers to jobs.
- **Volunteer Work Tracking:** CiviVolunteer lets you log volunteer activity for supporters, including date, duration, and tasks.
- **Membership Tracking:** CiviMember provides functionality to track member levels, payments, and expiration dates.
- **Peer-to-Peer Fundraising:** Personal campaign pages, which are essentially "child" pages of a central contribution page, allow constituents to create fundraising pages to support your cause. Donations made through such a page soft credit the owner of the page and can be reported on.
- **Other Interactions:** The system also offers surveys, petitions, and campaigns.



## Accounting Support

- **Existing Integrations:** Can export data to QuickBooks or CSV format.
- **Approach to Batching:** Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash, and credit payments.
- **Reconciling a Batch:** Cannot mark a batch of payments as “reconciled with accounting.”
- **Controlling Reconciled Donations:** After a batch has been exported, it cannot be reopened.

## Permissions

- **Permissions:** You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field Level Permissions:** You can define user or group permissions on a field-by-field basis.

## Customization

- **Customizing Values:** You can change list values for most fields, including the order of the list.
- **Custom Fields:** Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields:** Lets you rename existing fields at no additional cost.
- **Moving or Deleting Fields:** Lets you move or hide some fields within the interface.
- **Custom Constituent Interactions:** Lets you create your own custom interactions in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization:** Several vendors will customize the system to your needs at additional cost.
- **Access to Source Code:** As an open source system, the source code is available to anyone who wants it.

## Integration

- **Existing Integrations:** Works with Drupal, Wordpress, or Joomla! CMS systems. Extensions allow connection to various third-party services, such as MailChimp, iATS, and others.
- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data. Can do a batch import for the system install, and an “incremental” import for subsequent jobs that adds deduplication functionality.
- **Access to API:** Provides an API to allow programmatic access to the system. (Includes an API explorer to support proper use.)
- **Third-Party Automation Support:** No built-in support. *CiviCRM reports Zapier is currently in development and based on the work of a student working with Google Summer of Code.*

## Ease of Use

- **Ease of Use for Novices:** Moderate. The system has a lot of different options and features. The system relies on many different components and extensions, which may each have several screens and buttons. Some screens display a lot of information, making it sometimes difficult to find features or fields. Less technically savvy users may feel initially overwhelmed.
- **Role-Based Interfaces:** Access to functionality can be controlled via either a content management system (e.g., Drupal) or CiviCRM’s own access control list settings. Data display can be entirely role based in this manner. For example, report widgets could be set to display for some users, but hidden for others.
- **Speed for Expert Users:** With sufficient technical knowledge, the system can be customized to work exactly as a technical user might want.

## Support and Training

- **Training:** Vendor provides training, either via the internet or live, at additional cost. Some training videos are available without cost.
- **Manuals and Documentation:** Provides an online help section with written documentation. Documentation for various components and extensions varies in detail.
- **Support:** Online community forum-based support available for free. Third-party vendors provide support for a fee.
- **Roadmap for Planned Upgrades:** Individual release notes are communicated via blog, which appears in-app, as well as on Github. The broader roadmap is published at <http://civicrm.org/roadmap>.
- **User Communities:** Community engagement largely takes place at <http://civicrm.stackexchange.com> and <http://chat.civicrm.org>, both of which are free to anyone.
- **Social Support:** Vendor manages accounts on LinkedIn, Twitter, Google+, and Facebook (page and group):  
<https://twitter.com/civicrm>  
<https://www.facebook.com/civicrm/>  
<https://www.facebook.com/groups/civicrm/>  
<https://plus.google.com/communities/114972789429616596475>  
<https://www.linkedin.com/groups/1418647>

## Installation and Maintenance

- **Installation and Maintenance:** You will either need to set up and maintain a web server on which to run the system or contract with a vendor to host the software as a service.

## Product Background

- **History:** CiviCRM was first released in 2005. CiviCRM is an LLC.
- **Clients:** As of January 2017, <https://stats.civicrm.org/?tab=geography> indicates more than 5,500 active sites in the U.S., Canada, and Mexico.
- **Sustainability:** CiviCRM is supported by foundation grants, revenue from paid development, consulting and training, and community contributions. The core project team includes six developers and one project manager.

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# DONORPERFECT, BY SOFTERWARE

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DonorPerfect, from SofterWare, Inc., delivers a full-featured Cloud-based constituent management system at five pricing tiers, which are based on donor record count and features. Since 2013, DonorPerfect updated to a modern design and significantly expanded built-in step-by-step help. DonorPerfect handles core donor management tasks for constituents, gifts, pledges, payments, and communications. Credit card payments and bank draft withdrawals are processed within the system. Donors can be thanked via either email or Word, where you can customize templates, merge, and print. Mobile apps for iOS and Android let staff update data on-the-go, and a customizable dashboard lets each desktop user see the data that matters to them. The most popular tier, “Express,” supports up to 2,500 constituent records, includes all the features above, and also offers integrated online forms and Constant Contact. You can add some features, such as an easy-to-use report writer, for a monthly fee (in this case, \$29 per month). But not all features are available as add-ons; some require a specific subscription tier. For example, scheduled reports functionality requires an upgrade to “Essentials” or higher. DonorPerfect also offers an app store, <http://connect.donorperfect.com>, of third-party apps that integrate with the system. These apps typically cost extra. The Lite version starts at \$1,068 per year, supports up to 1,000 constituent records, and includes the core donor management tasks, while the Premier version costs \$5,508 per year and supports up to 25,000 constituent records. There is also an Enterprise version for larger nonprofits. For any tier, you can manage 1,000 or more (the quantity varies by tier) additional records for a fee of \$29 per month. All tiers include webinar training, chat support, and allow an unlimited number of users.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$1,068
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$1,068
- **Pricing:** First year (Three users, 20,000 donors) \$5,508
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$5,508

## Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person from anywhere in the interface using a form that searches name and address information.
- **Quick Search on Custom Fields:** Lets you find a person by searching data entered into custom fields.
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name or other criteria you can specify. Users can run or schedule a duplicate checking report.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts:** For ease of reconciling with accounting systems, each donation is automatically assigned to a batch when you process the donations that have not yet been receipted.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface, which can be tailored on the fly with the appropriate fields and defaults for a particular set of gifts.
- **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.

- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.
- **Reminders for Pledges:** Alerts appear for periodically recurring pledge payments, but you must run a report to see other pledges.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge against the employer when you enter the gift to be matched.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund, or split the gift across multiples of these, as well as track the solicitation and sub-solicitation that generated a gift.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Gift Notes:** Lets you add free-form notes to a gift. These notes can be queried and reported on.
- **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Stock Gifts:** The system can track both the unsold and sold values of stock gifts.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of” and tributes, and schedule notifications—for instance, summary thank you letters—to the honorees.
- **Zero Dollar Donations:** Lets you enter a gift with a zero dollar value for reporting purposes as an in-kind gift. Lets you also record the asset value amount of the gift that’s tax deductible. You can also exclude zero dollar donations from certain calculated fields.
- **Premiums:** Optional integrated third-party software, DonorShops, allows handling of premiums.

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate time frame.
- **Do Not Contact:** Lets you display pop-up and/or a field near the top of the donor screen to notify staff that a particular person should not be contacted.
- **Relationships Between Donors:** Lets you track relationships between donors and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”), or directional (“boss”; “works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has a relationship including the degrees of separation between everyone in the database.
- **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can define which addresses to share or not to share in relationships.
- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.
- **Donor Notes:** Lets you query and report on free-form notes about donors.

- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters and emails for each donor.
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.
- **Donor Source:** Lets you track the source of a particular donor.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.
- **Online Integrated Data Cleaning and Appending:** Includes free USPS postal address certification. Lets you link to WealthEngine or DonorSearch by passing donor information from the system. Data brought back into the system goes into fields separate from other system fields.
- **Mobile Support:** Lets you access constituent records and run reports from iOS and Android devices via an application designed specifically for mobile access.
- **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database. Attached documents can be included in searches and queries.
- **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor's social media links to fields in the donor record for Facebook, LinkedIn, or Twitter.
- **Ability to Track Donor Social Media Activities in the System:** Constituents' organization-related social media activities can be captured in the system. Users can look up donors through Facebook or Twitter and pull information from their social media profiles into the system. Information imported from social media can be included in searches and queries.

## Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You can also create your own custom stages and track a donor's progress through them, with associated dates. DonorPerfect also includes "SmartActions," which lets you automate emails, message, update fields, and more based on business rules.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date; shows the reminder prominently on the calendar or in a task list at the appropriate time.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.
- **Donor Research:** Automatically matches donor information to outside resources in order to provide more information on giving capability and priority via WealthEngine or DonorSearch. WealthEngine and DonorSearch cost extra.
- **Supporter Profiles for Prospecting:** Lets you track how many times a constituent volunteered, attended events, or opened emails via "engagement" fields, which are searchable.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by generating a segment.
- **Proposal Tracking:** Lets you track what proposals are due, what you've submitted, and what has already been approved by a particular foundation.
- **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest.
- **Grant Tracking and Reporting:** Lets you track and report on grants separately from other donations, with customizable moves management processes for grant cultivation.



- **Thresholds and Action Triggers:** Lets you schedule reports to run on thresholds. Triggers can be configured via SmartActions, with specific threshold quantity values set for different actions (e.g., when more than X donor gifts need to be acknowledged).

## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates with Microsoft Word that include mail-merged information, then save these templates to DonorPerfect. You can then mail merge data into those templates through the system, without the need to export data.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac. As all letters are mail merged through the server, it doesn't matter what operating system is running on the desktop computer.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates in Word with complete control over layout, formats, logos, and images.
- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking that Letters Were Sent:** Automatically logs for each donor that a letter was sent.
- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface.
- **Batch Processing of Thank Yous:** Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor's previous giving history, either with Microsoft Word or calculated fields.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Printing Labels:** Lets you easily print labels for a set of people from the same query result page used to print letters.

## Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and "mail merge" type inserted data.
- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor's previous giving history.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails:** Lets you schedule email to send in the future.
- **Email Server:** Emails are sent via system-integrated Constant Contact, protecting you from blacklisting; Constant Contact takes measures to ensure email goes to donors' inboxes rather than their spam filters.
- **Unsubscribes:** Integration with Constant Contact allows donors to unsubscribe from emails without involving the organization.
- **Email Reports:** Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addresses that didn't go through.
- **Automatic Emails:** Lets you set up automatic emails based on certain events via SmartActions.

## Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also define “exclusive not” queries which exclude the results for one query from a different one. You can also write your own SQL queries if you like.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.” They provide particularly powerful yet easy to use functionality in this area—you can define “exclusive not” queries that exclude the results for one query from a different one.
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the filters and criteria from your saved query. This is all done on one screen, reducing the complexity.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update most fields in the database for the list, or export the list.
- **Packaged Queries:** The system includes several dozen packaged queries.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT).
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns in one report, including the donations compared to the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** Can create basic ad hoc reports by using a simple wizard and choosing what columns you want to include, adding groups or totals, and can schedule the reports on a recurring basis via email. You can have full flexibility over every aspect of custom reports with an add-on called SmartAnalytics for an additional charge.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within ad hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to CSV, Excel, PDF, or Word format.
- **Distinguishing Reports:** A new “sidebar reports” feature lets users edit and update report filters on the fly from one screen. There is also a new “Report Center,” which makes it easy to group favorite reports, create new reports, and schedule reports on an ongoing basis through email.
- **Custom Reports:** Lets you create custom reports through a reports wizard.
- **Graphical Capabilities:** The system lets you add charts and graphs to reports to the dashboard.
- **Dashboard Placement:** Lets you place reports, charts, and graphs on a dashboard.
- **Scheduled Reports:** Lets you schedule all custom reports (and many standard reports) to run automatically at a set time, create a document (Excel or PDF), then be delivered via email. Contents can be password protected.
- **Reporting Triggers:** Notifications may only be triggered when an individual condition is met (e.g., gift > \$5,000), not a goal condition.

## Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors' credit cards or bank accounts (ACH) within the system.
- **Processing Fees:** All transaction fees are 2.89 percent plus \$0.30/transaction, with no monthly fee or minimum.
- **Recurring Gifts:** Lets you set up recurring gifts, which are both logged and charged to donors' credit cards at designated intervals.
- **Web Sign-Up Form:** People can easily sign up for your email list via an integrated sign-up form on your website. Web forms can be customized and branded by the client via WYSIWYG editor, but HTML skills are required for detailed branding and navigation customization.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database. They offer a complete form builder that allows you to create an unlimited number of forms, and fully customize their fields, and their position and order.
- **De-Duping Online Actions:** Online sign-ups or payments are logged to donors' existing payment records by name or other contact information you can specify. These possible duplicates are presented for your confirmation before being logged in the system.
- **Event Registration:** Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) and meal options.
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.
- **Distributed/Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts. *For an additional fee as of January 2017; will be included as part of subscription starting April 2017.*
- **Membership Dues:** Lets members pay membership dues online using an included "Membership form" at no additional cost. In order to customize the membership form, the client will have to upgrade to WebLink Pro, at additional cost.
- **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart.
- **Payment Form Customization:** Vendor provides an online payment form, which can be customized to completely match your website.
- **Required Fields:** First name, Last name, Address, Email address, and Credit Card fields (card number, expiration date, and card security code) are the only fields required.
- **Transaction Fees:** DonorPerfect handles payment processing for a simple fixed rate structure of 2.89 percent plus \$0.30/transaction.
- **Refunds:** Lets you easily issue refunds through the system.
- **Mobile Giving:** There is no donor portal. Donors can make online donations via mobile phone.
- **Self Management of Donor Record:** Lets donors manage their own contact information online, but requires a module at additional cost.

## Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details:** Lets you manage table details for an event, including seating arrangements and the amount of gifts raised per table.
- **Nametags:** Lets you easily create nametags for an event via their standard mail merge process.
- **On-Site Registration:** Does not provide any specific functionality to support on-site registration outside of creating a custom payment form that can be viewed on a mobile device. The vendor offers a free mobile payment app, as well as smartphone-compatible swipe hardware, for additional cost.
- **Volunteer Interests:** Lets you track one set of interests in order to match volunteers with jobs.

- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration, and tasks, and calculate the dollar equivalent for their time.
- **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.
- **Peer-to-Peer Fundraising:** As of review, peer-to-peer functionality is available at additional cost. This includes the ability for unlimited soft credits to be created and linked to one or more donor records. (Vendor indicates peer-to-peer features will be upgraded and included in the subscription service in April 2017.)
- **Other Interactions:** In addition to the interactions we've covered here, the system offers support for share-a-thon events, the ability for online donors to check if their employer will match gifts, and the ability for constituents to update their own information online. The vendor also offers ReadySetAuction for auctions management.

## Accounting Support

- **Existing Integrations:** Lets you create a file format tailored to upload easily into QuickBooks, MiP, and a few other systems, with an additional module at additional cost. (Included in Essentials and above.)
- **Approach to Batching:** Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash, and credit payments.
- **Reconciling a Batch:** Cannot mark a batch of payments as “reconciled with accounting.” You can mark records as being passed to accounting, but this is not quite reconciliation.
- **Controlling Reconciled Donations:** There is an optional setting that disables the ability to edit a gift after the gift has been processed in a batch. Alternatively, you could restrict the group of people who can edit reconciled donations, or prohibit it altogether, using the (complex) advanced permissions functionality.

## Permissions

- **Permissions:** You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field Level Permissions:** Lets you define user or group permissions on a field-by-field basis and by query, allowing extremely detailed and granular access to specific data based on a saved query. SmartScreens dynamically hide or rename fields to fit the nature of a record.

## Customization

- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others.
- **Custom Fields:** Lets you add up to 1,000 custom fields, which can be added and placed on any data entry screen in the system, and anywhere on the screen. All custom fields can be included in any query and on any custom report.
- **Renaming Fields:** Lets you rename most, but not all, existing fields, at no additional cost.
- **Moving or Deleting Fields:** Lets you move all fields within the interface. Most, but not all, fields can be deleted altogether.
- **Custom Constituent Interactions:** Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization:** Vendor will extensively customize system to your needs as part of the setup process. This one-on-one customization is complimentary for all system levels.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality.

## Integration

- **Existing Integrations:** Can exchange data with Constant Contact, DonorSearch, DonorShops, Agile Ticketing, Double the Donation, KnowWho, Aquabanc, raisin, and SimpleTix. View additional apps at <http://connect.donorperfect.com>.

- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Access to API:** DonorPerfect Online offers a REST based API that offers both import/export calls to all data objects and elements within the program.
- **Third-Party Automation Support:** No support for end-user API platforms, such as IFTTT or Zapier. (Vendor indicates that connecting to Zapier is on the product roadmap for 2017.)

## Ease of Use

- **Ease of Use for Novices:** Moderate. The system has a lot of different options and features, but since the vendor will configure it on setup to better match your terminology and workflow on setup, the learning curve is decreased a bit.
- **Role-Based Interfaces:** The dashboard can be completely customized per user. The entry screens can be completely different by user group/role.
- **Speed for Expert Users:** Easy. Experts can design the custom fields and placement to tailor them to their own workflow, and there are a number of quick data entry options. The query building tool provides a lot of control once you've learned how to use it.

## Support and Training

- **Training:** Vendor provides free recorded Webinar training, self-guided “walk-throughs” of commonly used features, and includes optional paid training either via the internet or live.
- **Manuals and Documentation:** Provides full written documentation, a training video library, and a forum area for users to ask questions of other users.
- **Support:** Provides an online help section from which you can sign up for trainings. Chat Support is included free. Live phone and email are available starting at \$348 per year
- **Roadmap for Planned Upgrades:** Vendor provides release notes, which are publicly available to users/clients. Roadmap is open to customers, as well.
- **User Communities:** Vendor maintains an active online community, including the Knowledge Base and other online resources.
- **Social Support:** Vendor is active on Twitter.

## Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

## Product Background

- **History:** Vendor has been in business since 1981. DonorPerfect Installed has been in use by clients since 1986 and was discontinued in 2016; DonorPerfect Online has been in use since 2001.
- **Clients:** Vendor reports 10,100 clients.
- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.



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# ETAPESTRY, BY BLACKBAUD

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eTapestry, a Cloud-native system from Blackbaud, seeks to serve small to mid-sized organizations that do not yet need the capabilities of the company's more powerful—and more expensive—The Raiser's Edge NXT. eTapestry handles online and offline gift tracking and manages mail and email acknowledgements, all from a tile-based customizable page layout. All versions let you publish up to 10 online forms for online giving, event registration, volunteer signup, and more. The system includes around 50 prepackaged reports, including a set of “executive reports” that provide campaign analysis, highlight donor renewal rates, and examine consecutive years of donor giving. Blackbaud re-designed and streamlined the query and report system since our last look at eTapestry. Now, you can change the fields displayed dynamically from the query preview screen; no need to specify fields elsewhere then re-run your report. While eTapestry lacks a special batch entry mode, you may set a few field defaults for faster data entry or import data from a spreadsheet. Donation data may be exported to more than 10 different accounting packages, including QuickBooks and BlackBaud's own Financial Edge. Blackbaud offers eTapestry at three price points, based on the number of records, ranging from 1,000 records for \$1,428 per year up to 20,000 records for \$4,788 per year. All packages include AddressFinder to update mailing addresses, but higher price point offerings allow for more annual updates of data. The higher price point offerings also add access to add-ons, such as WealthPoint Rating. Other paid add-ons include Everydayhero Pro (a Blackbaud service that handles peer-to-peer fundraising), an online gift store, MatchFinder (a Blackbaud service that automatically identifies organizations that match employee gifts), as well as additional records, emails, forms, and more. All versions allow unlimited number of users.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$1,428
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$1,428
- **Pricing:** First year (Three users, 20,000 donors) \$4,788
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$4,788

## Adding and Tracking Donations

- **Quick Search:** Lets you search the database for an existing constituent using a search field that searches name and address fields.
- **Quick Search on Custom Fields:** Lets you find a constituent by searching data entered into custom fields on the “Find Account” screen.
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people that match name, address, or email fields. This is optional; you can turn off the duplicate checking. May also use a quick action to “Check for Possible Duplicates.”
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields: Add > Gift > then enter required fields, such as date, fund, and gift amount.
- **Batching Gifts:** The system does not group donations into batches for reconciliation with accounting systems. All entries are automatically tracked as transactions.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through the standard gift interface.
- **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.

- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.
- **Adding Pledges:** The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.
- **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry. An optional module, MatchFinder, lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge against the employer when you enter the gift to be matched.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund, or split the gift across multiples of these, as well as track the solicitation that generated a gift.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like with a Soft Credit field.
- **Gift Notes:** The system lets you add free-form notes to a gift. These notes can be queried and reported on.
- **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Stock Gifts:** The system can track both the unsold and sold values of stock gifts.
- **Other Gift Types:** Supports tracking of tribute gifts, disbursements, in-kind, or other gifts.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees with a query.
- **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.
- **Premiums:** Lets you assign and track premiums and record tax deductible amount manually (or automatically, if configured online).

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate time frame.
- **Do Not Contact:** Lets you display an optional, prominent message as a pop-up on the donor screen to notify staff that a particular person should not be contacted. Alternatively you can see this information on the donor screen.
- **Relationships Between Donors:** Lets you track relationships between donors and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”), or directional (“boss”; “works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships using a network view to see the degrees of separation between people in the network.
- **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships.

- **Staff Relationships:** User defined fields let you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.
- **Donor Notes:** Lets you query and report on free-form notes about donors.
- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings through either a call log or tasks. Manual communication logs may be included in system queries and reports.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters for each donor, and additionally stores the contents of each email sent from the system to each donor.
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.
- **Donor Source:** Lets you track the source of a particular donor by viewing the first journal entry or with an optional user defined field.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Either create a user-defined field to track date of death, or modify the mailing status field.
- **Online Integrated Data Cleaning and Appending:** All versions allow USPS address updates, and the most expensive levels allow a greater number of updates per year. Some versions of the system allow access to WealthRating information. Social media account identification is an add-on module.
- **Mobile Support:** Lets you access constituent records, send queries, and run reports via a mobile web browser.
- **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.
- **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor's social media links to fields in the donor record.
- **Ability to Track Donor Social Media Activities in the System:** Does not meet this criteria.

## Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow using custom fields.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date and shows the reminder prominently on the calendar (which may be on the homepage) at the appropriate time.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.
- **Donor Research:** Some versions automatically matches donor information to outside resources in order to provide more information on giving capability and priority via a partnership with WealthRating. MatchFinder is an optional add-on to aid gift matching. TargetAnalytics is an optional add-on to improve donor response rates with data.
- **Supporter Profiles for Prospecting:** User-defined fields and custom queries can be used to identify supporters (e.g., volunteers) who meet the defined criteria. If user-defined fields are used, then this information can be included in the Account Header for easy access when looking at a constituent account.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, with user defined fields.
- **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report with user defined fields.
- **Proposal Tracking:** User defined fields let you track what proposals are due, what you've submitted, and what has already been approved by a particular foundation.
- **Foundation Interest Tracking:** User defined fields let you track a particular foundation's interest areas based on your organization's custom categories of interest.

- **Grant Tracking and Reporting:** Lets you track and report on grants via custom fields only.
- **Thresholds and Action Triggers:** Lets you schedule reports to run, but no automatic threshold-triggered actions.

## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates within the system, and then mail-merge letters in Word or PDF format.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac. As all letters are mail merged through the server, it doesn't matter what operating system is running on the desktop computer.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates with complete control over layout, formats, logos, and images using their built-in word processor.
- **Personalizing Letters:** Export to Word to customize letters before printing.
- **Tracking that Letters Were Sent:** Automatically logs for each donor that a letter was sent.
- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous:** Automatically creates a queue of people to be thanked as part of the gift entry process. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor's previous giving history, but does not support conditional or calculated fields.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Printing Labels:** Lets you easily print labels for a set of people from the same query used to print letters.

## Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records. The system automatically logs the email and saves a copy as part of the donor record.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and "mail merge" type inserted data. The system uses the same mail-merging tool for email as it does for printed letters, with a few additional email options, such as including embedded web content.
- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor's previous giving history, but does not support conditional statements (e.g., IF...THEN) in templates.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails:** Lets you schedule email to send in the future.
- **Email Server:** System offers two options for every mass email: Basic mass email sends via SMTP delivery and does not provide sophisticated reporting. Advanced mass email sends via an integrated third-party provider that provides reporting.
- **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization. (Organizations can also manually Opt Out or Opt In constituents. eTapestry does not offer integrated list management at this time, this would have to be managed by the organization.)
- **Email Reports:** Advanced mass email lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addresses that didn't go through. Custom queries can be built to segment your lists in order to send different versions of the same email.



- **Automatic Emails:** Lets you set up automatic emails based on certain events, like a web form submission or newsletter sign-up.

## Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also define “exclusive not” queries which exclude the results for one query from a different one.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using criteria connected with logical “ands” and “ors.” They provide particularly powerful yet comparatively easy to use functionality in this area—you can define “exclusive not” queries that exclude the results for one query from a different one.
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the filters and criteria from your saved query. This is all done on one screen, reducing the complexity.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can view, export, or send results to a report, or mail or email merge.
- **Packaged Queries:** The system includes several packaged queries.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT).
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns unless you add user defined fields.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** Can create basic ad hoc reports by choosing what columns you want to include, and adding groups or totals.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within ad hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Does not meet this criteria.
- **Exporting Reports:** Lets you export reports to CSV, Excel, PDF, or Word merge formats.
- **Distinguishing Reports:** Provides a set of “executive reports” to analyze donor giving and retention patterns, including a Giving Dynamics Report.
- **Custom Reports:** Lets you create custom reports through a reports wizard.
- **Graphical Capabilities:** Does not let you add charts and graphs to reports.
- **Dashboard Placement:** Lets you place both standard and custom reports on your homepage. Also offers a handful of homepage tile reports that include charts and thermometers to show fundraising progress.
- **Scheduled Reports:** All custom and standard reports can be scheduled nightly, weekly, monthly, etc. to be sent to one or multiple email addresses. Scheduled reports can also be placed in a user’s drop box.



- **Reporting Triggers:** Does not support this functionality, although a homepage report tile may show when some goals are reached.

## Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors' credit cards within the system with Blackbaud Merchant Services, and some other services, such as iATS, as well.
- **Processing Fees:** Customers can choose to use Blackbaud Merchant Services to process gifts or one of our other supported processing partners. Customers should contact the processing service directly for pricing.
- **Recurring Gifts:** Lets you set up recurring gifts, which are both logged and charged to donors' credit cards at designated intervals.
- **Web Sign-Up Form:** People can easily sign up for your email list via an integrated sign-up form on your website. Web forms can be customized and branded by client via WYSIWYG editor, but HTML skills are required for detailed branding and navigation customization.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database.
- **De-Duping Online Actions:** Vendor reviews submitted name, street address, and email. If two of those three match, data is merged into the existing account. Otherwise, it creates a new account.
- **Event Registration:** Lets you accept online registration fees for events, including multiple ticket prices such as a VIP ticket, meal options, and more with user defined fields.
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.
- **Distributed/Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns, thanks to Blackbaud's everydayhero service.
- **Membership Dues:** Lets members pay membership dues online, although you may need user defined fields to track membership details over time.
- **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart.
- **Payment Form Customization:** Vendor provides functionality to allow you to embed an online payment form into your own website.
- **Required Fields:** 16 fields are needed for a successful online donation, with 5 of those containing payment information. Lets you use an online form to set up a recurring donation that will automatically process according to the donor's specified schedule.
- **Transaction Fees:** eTapestry does not charge a transaction fee for processed gifts. Customers can choose to use Blackbaud Merchant Services to process gifts or one of our other supported processing partners. Customers should contact the processing service directly for pricing.
- **Refunds:** You must issue refunds through the merchant account, and then log the refund into the system manually.
- **Mobile Giving:** Can access the system via mobile phones.
- **Self Management of Donor Record:** Lets donors manage their own records, but requires a module at additional cost.

## Tracking Other Interactions

- **Event Registrants:** Provides a defined field set of "Event Fields" that organizations can install.
- **Tracking Guests:** Would need to create user defined fields to track event guests.
- **Table Details:** Would need to create user defined field to track table details.
- **Nametags:** Lets you create nametags for an event via a standard mail merge process.
- **On-Site Registration:** Does not provide any specific functionality to support on-site registration.

- **Volunteer Interests:** Provides a defined field set of “Volunteer Fields” that organizations can install.
- **Volunteer Work Tracking:** Provides a defined field set of “Volunteer Fields” that organizations can install and expand.
- **Membership Tracking:** User-defined fields and custom queries can be use to track current members and identify memberships about to expire. An online form can be set up to accept new, renewal, and gift memberships. The online forms can support multiple membership levels.
- **Peer-to-Peer Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns, thanks to Blackbaud’s everydayhero service. You may also apply soft credits to solicitors when donations are made. Custom reports can be built to report on money raised by solicitors. The everydayhero integration offers standard reports that make it easy to report by event or participant.
- **Other Interactions:** [No response]

## Accounting Support

- **Existing Integrations:** Lets you create a file format tailored to upload easily into Colleague, Evansville, Financial Edge, ForFUND, FundWARE, Intacct, MIP, MYOB, NBA, Norton, and QuickBooks Desktop.
- **Approach to Batching:** Does not help you to create batches of payments per se to ease the reconciliation process with an accounting system.
- **Reconciling a Batch:** Not natively supported. Would need user defined fields to track reconciled batches.
- **Controlling Reconciled Donations:** Not natively supported. Would need user defined fields to track items exported to accounting.

## Permissions

- **Permissions:** You can grant individuals access to granularly read, update, create, or delete data for a wide variety of system functions.
- **Field Level Permissions:** Field-level permission control is included with the Pro package and available as an add-on module to other levels.

## Customization

- **Customizing Values:** Lets you customize drop-down values for many fields. You can change list values for many fields, including the order of the list.
- **Custom Fields:** Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields:** Cannot rename existing fields.
- **Moving or Deleting Fields:** A few standard fields can be removed if not being used. Otherwise standard fields cannot be moved or deleted.
- **Custom Constituent Interactions:** Lets you create your own custom interactions in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization:** Vendor does not customize the system.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality.

## Integration

- **Existing Integrations:** The system can integrate with everydayhero, Constant Contact, and supports standard exports to some accounting software, such as QuickBooks, MIP, Intacct, and others.
- **Data Export:** Lets you export all data visible to users into another file format. Vendor offers a service to export all data.

- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Access to API:** Vendor offers a free API.
- **Third-Party Automation Support:** System does not connect to tools such as IFTTT or Zapier.

## Ease of Use

- **Ease of Use for Novices:** Easy. The system is carefully designed to be free of clutter, and easy to understand. There are easy step-by-step wizards, searches, and quick lists for many features.
- **Role-Based Interfaces:** The Dashboard, Account Home pages, Task Menu, and a few other settings are customizable by user. Users can also set the database to one of five languages (English, French, Dutch, Italian, or Spanish).
- **Speed for Expert Users:** Moderate. The system is optimized around the needs of novice users, and while all are likely to find it intuitive, experienced development directors may wish for more flexibility and shortcuts to ease repetitive tasks.

## Support and Training

- **Training:** Some video training is available with the system. Vendor provides additional training, either via the internet or live, for a fee.
- **Manuals and Documentation:** Vendor provides help text throughout the application. A searchable online knowledgebase also is available.
- **Support:** Chat support included with the system. Phone support and consulting available for a fee.
- **Roadmap for Planned Upgrades:** Current release notes are accessible on the login page, past release notes are available online (<https://www.blackbaud.com/howto/etapestry.aspx>). Roadmap webinars are offered (and recorded) throughout the year for customers.
- **User Communities:** The eTapestry online community is available to anyone with a blackbaud.com login.
- **Social Support:** [No response]

## Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

## Product Background

- **History:** Blackbaud has been in business since 1992.; eTapestry has been publicly available since 1999.
- **Clients:** Vendor reports eTapestry has more than 6,000 customers worldwide.
- **Sustainability:** Vendor states that this product is financially sustainable.

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# EXCEED BEYOND, BY TELOSA SOFTWARE

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Telosa launched Exceed Beyond in 2013, marking the company's entry into the online, software-as-a-service sector after decades of installed software products. Exceed Beyond helps manage constituents, donors, gifts, memberships, and related communications and reporting. The company's experience in the sector shows. A quick search returns results found everywhere in the system. A quick lists feature lets staff save a group of records for later use. A flexible address system lets staff attach an address to either a specific person in a household or the household as a whole. Screen layouts and displays are customizable, and fields can be added throughout the system. For more capabilities, you add modules—at \$35 per module per month. Available modules support campaign management (including moves management), event management, volunteer management, grant management, hospitality guest/asset management, and room management. The left-navigation menu shows all the modules available to you. As you navigate to a module, related information appears to the right: a mix of tabs, fields, and scrollable data displays. New users might need a little time to identify the information that matters most on some screens, although a step-by-step indicator shows the workflow for many multi-step sequences. Partners provide additional features. Qgiv enables online giving and handles event registrations and payments. WealthEngine and DonorTrends help you better understand donors. Basic email works within the system, but Constant Contact, MailChimp, and VerticalResponse integrations offer robust email tools. Highcharts.com adds graphics to some of the more than 100 donor, constituent, gift, and other system reports. Exceed Beyond begins at \$840 per year for up to 1,000 records, and increases with the number of records stored—25,000 records would cost \$5,040 per year—although there are discounts for multi-year contracts. Pricing includes free email and web-based support, and an unlimited number of users. Additional training and support options are available for a fee.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$840
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$840
- **Pricing:** First year (Three users, 20,000 donors) \$5,040
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$5,040

## Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing record from anywhere in the interface using a form that searches people and organizations, addresses, email, phone numbers, notes, activity records, gifts, relationships, as well as all other modules (e.g., Volunteers, Grants, Guest, etc.).
- **Quick Search on Custom Fields:** Lets you find information by searching data entered into custom fields.
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name or contact information. The system also prevents duplicate entries based on fields other than name (e.g., email address). The system supports move and merge to combine records.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. For example, for a person's bio view, choose Add gift.
- **Batching Gifts:** Lets you add gifts to batches during data entry and post-entry.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface. Each user can customize pre-set entry templates, each with different different fields, values, and data entry order, as required.

- **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.
- **Importing Gifts:** The Importer allows users to import new records and/or update existing records with gifts and address data. Users can map and save import templates to custom file formats. Data also integrates with Qgiv online giving and DonorCommunity.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled dates.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system does not notify you that a pledge exists.
- **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified. Can create pledge reminders in Communications to send mail and email reminders.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund, or split the gift across multiples of these, as well as track the solicitation and sub-solicitation that generated a gift.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Gift Notes:** The system lets you add free-form notes to a gift. These notes can be queried and reported on.
- **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to constituents, gifts, activities, and/or proposals and stores them as part of the database.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Stock Gifts:** The system can track both the unsold and sold values of stock gifts.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, sales, member dues, or other gifts.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.
- **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.
- **Premiums:** Lets you manually track premiums and record tax deductible amount.

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, tag them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings as well as select a preferred address.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate time frame.
- **Do Not Contact:** Lets you indicate do not mail or email preferences. Donors can specify alternate or preferred methods of contact, if applicable.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”), or directional (“boss”; “works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Householding:** A database record describes a Household or Organization and all their individuals and related contact information and actions; you can connect individuals in a household and create couples. You can define which addresses, phones, and emails to share or not to share in relationships. Gifts can be attached to the Household/Organization or a specific individual within a Household/Organization.



- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.
- **Donor Notes:** Lets you query and report on free-form notes about donors.
- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings. Manual communication logs are included in system queries and reports.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters and emails for each donor.
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving. You can configure this screen to choose the lists and aggregate stats that are most useful to you.
- **Donor Source:** Lets you track the source of a particular donor.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.
- **Online Integrated Data Cleaning and Appending:** Integrates with USPS for address validation and completion for records as they are entered. Addresses may be updated from a file via the importer. Integration with WealthEngine and DonorSearch prospect research services allows the user to import bulk wealth data and look-up records via a hyperlink.
- **Mobile Support:** Lets you access constituent records from mobiles via a mobile web browser.
- **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.
- **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor's social media links to fields in the donor record.
- **Ability to Track Donor Social Media Activities in the System:** Does not meet this criteria.

## Prospecting and Proposals

- **Prospecting Workflow:** Campaign module lets you assign both a priority and a stage to a donor to manage a prospecting workflow. Campaign Stages are customized by the user and can be specific to each campaign.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date and shows the reminder prominently on the calendar or in a task list at the appropriate time.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.
- **Donor Research:** Optional modules can match donor information to outside resources in order to provide more information on giving capability and priority via a partnership with WealthEngine, DonorTrends, and DonorSearch.
- **Supporter Profiles for Prospecting:** Can create lists to identify supporters who aren't major donors, but are otherwise very active.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects:** Lets you easily see lists of donors assigned to you as a solicitor.
- **Proposal Tracking:** Lets you track what proposals are due, what you've submitted, and what has already been approved by a particular foundation.
- **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest.
- **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts; can record grant probabilities, request and award amounts, payment types, and deliverables.
- **Thresholds and Action Triggers:** Custom donor levels can be created and automatically assigned to records based on levels of giving.

## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates within the system, and then mail-merge to Word or PDF formats.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac. As all letters are mail merged through the server, it doesn't matter what operating system is running on the desktop computer.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates with complete control over layout, formats, logos, and images using their built-in word processor.
- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking that Letters Were Sent:** Automatically logs for each donor that a letter was sent and records the letter in the donor's journal.
- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous:** Automatically creates a queue of people to be thanked as part of the gift entry process. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor's previous giving history.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Printing Labels:** Automatically asks if you'd like to print labels for each letter printed. The system provides advanced functionality in this area: can acknowledge gifts by merging to email, letters, and labels all at once.

## Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records. The system logs the email and saves a copy as part of the donor record.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and "mail merge" type inserted data.
- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor's previous giving history.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails:** Cannot schedule email to send in the future.
- **Email Server:** Individual email is sent through the organization's email servers. Merged email is sent from Telosa's servers.
- **Unsubscribes:** Constituents can be manually marked as unsubscribed or do not email individually. They can also be unsubscribed in bulk via the integration with Constant Contact, MailChimp, and VerticalResponse.
- **Email Reports:** Lets you see the email campaign results, including click-through, open rates, bounced, and unsubscribed emails in the system.
- **Automatic Emails:** Third-party partner services, such as Qgiv and DonorCommunity, handle this.

## Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also define “exclusive not” queries, which exclude the results for one query from a different one.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the filters and criteria from your saved query.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.
- **Packaged Queries:** The system includes several packaged queries.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT).
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns in one report, including the donations compared to the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** Can create basic ad hoc reports by choosing what columns you want to include, and adding groups or totals.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within ad hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to CSV, Excel, and PDF formats.
- **Distinguishing Reports:** Vendor highlighted sophisticated donor retention and analysis reports.
- **Custom Reports:** Lets you create custom reports.
- **Graphical Capabilities:** Does not let you add charts and graphs to reports.
- **Dashboard Placement:** Does not let you add reports to the dashboard.
- **Scheduled Reports:** Cannot schedule reports.
- **Reporting Triggers:** Cannot set trigger conditions.

## Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors’ credit cards within the system, with third-party processing, including iATS as well as EFT.
- **Processing Fees:** Telosa partners provide various rates depending on the services needed.
- **Recurring Gifts:** Lets you set up recurring gifts, which are both logged and charged to donors’ credit cards at designated intervals.
- **Web Sign-Up Form:** Third-party providers offer web forms, such as DonorCommunity.com.

- **Online Payments:** Third-party partnerships let you set up an online payment form on your website and pull online payments automatically into your database.
- **De-Duping Online Actions:** The interface that you use to proof the list of online payments matches donors by first, last, and middle name, organization, phone, email, and address, and shows you potential duplicates.
- **Event Registration:** Lets you accept online registration fees for events, at additional cost, using an add-on module.
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards or paid via EFT.
- **Distributed/Team Fundraising:** Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts. But the system can integrate with third-party fundraising tools, including Qgiv and DonorCommunity.
- **Membership Dues:** Lets members pay membership dues online, at additional cost, using a separate module.
- **Shopping Cart:** Third-party providers offer this functionality.
- **Payment Form Customization:** Third-party providers offer this functionality.
- **Required Fields:** Required fields can be set by the user and vary depending on the services needed.
- **Transaction Fees:** Telosa partners provide various rates depending on the services provided.
- **Refunds:** You must issue refunds through the merchant account, and then log the refund into the system manually.
- **Mobile Giving:** There is no donor portal.
- **Self Management of Donor Record:** Does not allow donors to manage their own records.

## Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event, with an optional module. Third-party providers handle all online-event functionality.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details:** Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table.
- **Nametags:** Lets you create nametags for an event via a standard mail merge process.
- **On-Site Registration:** Does not provide any specific functionality to support on-site registration.
- **Volunteer Interests:** Lets you track a detailed profile of someone's interests and aptitudes, including several different types of information, in order to match volunteers to jobs. This functionality requires an optional module at additional cost.
- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration, and tasks, as well as the dollar equivalent for their time. This is part of the optional volunteer module.
- **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.
- **Peer-to-Peer Fundraising:** Peer-to-peer fundraising handled by partners, such as Qgiv and DonorCommunity. Peer-to-peer gifts can be imported.
- **Other Interactions:** An optional guest/hospitality module tracks guest and/or patient visits.

## Accounting Support

- **Existing Integrations:** Integrates with QuickBooks Online. Lets you create a file format to upload data into QuickBooks Desktop.
- **Approach to Batching:** You can make and post batches in order to ease the reconciliation process with QuickBooks Desktop or Online. You would typically manually compare reports from the database and your accounting package to reconcile.

- **Reconciling a Batch:** Lets you lock a batch of payments as “reconciled with accounting.”
- **Controlling Reconciled Donations:** Each gift record is “locked” after a thank you letter is printed or the batch is closed. The system allows only one batch code per gift.

## Permissions

- **Permissions:** You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field Level Permissions:** You can define user view and/or edit permissions for specific pages and/or links.

## Customization

- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others.
- **Custom Fields:** Users can add custom fields of any type to almost any data entry screen at no additional cost.
- **Renaming Fields:** Cannot rename standard fields.
- **Moving or Deleting Fields:** Can move or hide most fields, but cannot delete standard fields.
- **Custom Constituent Interactions:** Lets you create your own custom interactions in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization:** Vendor does not customize the system, but does respond to customer feedback.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality.

## Integration

- **Existing Integrations:** Can work with DonorCommunity and Qgiv for online donations, and supports Constant Contact, Vertical Reponse, and MailChimp for email. Also works with WealthEngine, DonorTrends, and DonorSearch. Also works with Quickbooks.
- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Access to API:** Vendor does not provide open access to APIs.
- **Third-Party Automation Support:** Vendor does not support integration with systems such as IFTTT or Zapier.

## Ease of Use

- **Ease of Use for Novices:** Moderate. The layout is well organized and generally fairly understandable. However, it’s a complex system, and it will take some time to learn.
- **Role-Based Interfaces:** The system supports role-based security, but not role-based interfaces.
- **Speed for Expert Users:** Moderate. Once you get used to the interface, it will be much faster to get things done, but there are still a lot of screens and fields to navigate through for many tasks.

## Support and Training

- **Training:** Vendor provides training, either via the internet, phone, recorded, or live, at additional cost.
- **Manuals and Documentation:** Provides an online help system.
- **Support:** Vendor provides email and internet support for free. Phone support is available for additional cost.
- **Roadmap for Planned Upgrades:** New features, updates, and planned functionality are presented to users as alerts when logging in, and within a support portal.



- **User Communities:** Vendors provides a user forum and knowledge-base in the web-based support portal.
- **Social Support:** No.

## Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

## Product Background

- **History:** Telosa has been in business since 1986. Exceed Beyond has been publicly available since 2013.
- **Clients:** Vendor reports 166 Exceed Beyond customers, and more than 3,000 total clients.
- **Sustainability:** [No response]

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# FUNDLY CRM, BY NONPROFITEASY

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Fundly CRM (formerly known as NonProfitEasy) has changed considerably since our 2013 review. The system was re-architected in 2014 to be able to accommodate larger nonprofits, and many core functions were completely revamped. The interface is clean and attractive, and screens are easily scannable with sections and other key information represented by easy-to-understand icons. Fundraising capabilities have been strengthened, from direct mail to online to grants. Veteran fundraisers will appreciate the ease of segmenting constituents to fit RFM models. There's a batch entry mode to quickly enter multiple gifts, which allows you to set defaults, and batches can automatically sync with QuickBooks. Email is sent through an integration with a third-party provider (SendGrid) and Fundly CRM provides drag-and-drop newsletter template formatting. Constituents can make donations, view their payment history and manage their recurring donations, register for events, and update their profile through either a widget placed on an existing website, page integration with Drupal or Joomla websites, or a WordPress plug-in. The system provides 160 built-in reports through a third-party tool (Exago), but many of the reports are complex and geared toward professional fundraisers and data analysts. You can create and save your own Express Reports by dragging and dropping fields into the query, then customizing the columns and sorting the data, but this requires scrolling through many different fields to find the ones you want. The system is highly customizable, with the ability to add custom fields and modules and enter custom data sets. Pricing ranges from \$600 per year for one concurrent user and up to 1,000 constituents to \$6,000 per year for unlimited users and up to 50,000 contacts.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$600
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$600
- **Pricing:** First year (Three users, 20,000 donors) \$6,000
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$6,000

## Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches basic contact information, including name and email.
- **Quick Search on Custom Fields:** Lets you find a person or organization by searching data entered into custom fields through the Advanced Search.
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name or other criteria you can specify.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts:** For ease of reconciling with accounting systems, donations may be entered as part of a batch by adding a batch name, or associated with a batch after entry by adding a batch name to the gift record.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface. However, this interface can not be tailored on the fly with the appropriate fields and defaults for a particular set of gifts. You can tailor the defaults for a particular set of gifts, but you can't change the fields on the fly.
- **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.

- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so. In addition, the outstanding amount pledged is prominently displayed at the top of the donor profile.
- **Reminders for Pledges:** Can flexibly configure the system to notify the appropriate staff member(s) with a reminder or via email when a pledge is near due.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry. The vendor reports that an integration for corporate matching donations is planned for late 2017.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund, or split the gift across multiples of these, as well as to track the solicitation and sub-solicitation that generated a gift.
- **Tracking Credit for Gifts:** Can make appear as if it were given by someone by crediting from the donor of record, without double-counting. Not the same as solicitor credit.
- **Gift Notes:** The system lets you add free-form notes to a gift. These notes can be queried and reported on.
- **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals. Grants from foundations are tracked separately from gifts from companies or other organizations.
- **Stock Gifts:** The system can track the sold value of stock gifts. You would need to use Custom Data Sets to track the unsold value.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.
- **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.
- **Premiums:** Lets you assign and track premiums and record tax deductible amount.

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate time frame.
- **Do Not Contact:** Lets you mark that a particular person should not be contacted, but staff must check a particular field to see it.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”), or directional (“boss”; “works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can define which addresses to share or not to share in relationships.
- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.

- **Donor Notes:** A large text area lets you enter and view free-form notes about donors. Lets you query and report on free-form notes about donors.
- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings. Manual communication logs are included in system queries and reports.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters and emails for each donor. Emails generated outside the system can be recorded by emailing them to the system (for example, bcc-ing a unique system email address on emails).
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.
- **Donor Source:** Lets you track the source of a particular donor.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings. System logic will make relevant updates due to death, e.g., replacing deceased as head of household, if necessary.
- **Online Integrated Data Cleaning and Appending:** Integrates with Smarty Streets and GeoCoder by passing donor information from the system either at the time of data entry or on a scheduled cycle.
- **Mobile Support:** Lets you access constituent records from mobiles via a mobile web browser. The system is responsively designed.
- **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.
- **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor's social media links to fields in the donor record.
- **Ability to Track Donor Social Media Activities in the System:** Does not meet this criteria.

## Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow through custom fields.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date. Shows the reminder prominently on the calendar or in a task list at the appropriate time.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.
- **Donor Research:** Automatically matches donor information to outside resources in order to provide more information on giving capability and priority via a partnership with DonorSearch.
- **Supporter Profiles for Prospecting:** Smart Tags can be used to identify supporters who meet the defined criteria.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.
- **Proposal Tracking:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Foundation Interest Tracking:** Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.
- **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts; can record grant probabilities, request and award amounts, payment types, and deliverables. Can record due dates and reminders for grants and assign them to any staff member.
- **Thresholds and Action Triggers:** Lets you schedule reports to run on thresholds. No automatic threshold-triggered actions.

## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates within the system, and then mail-merge to them without the need for any other system.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac. As all letters are mail merged through the server, it doesn't matter what operating system is running on the desktop computer.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates with complete control over layout, formats, logos, and images using their built-in word processor.
- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking that Letters Were Sent:** Automatically logs for each donor that a letter was sent.
- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous:** Automatically creates a queue of people to be thanked as part of the gift entry process. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor's previous giving history.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Printing Labels:** After you print out letters, you must navigate to a different interface to print out labels for that mailing.

## Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records. The system automatically logs the email and saves a copy as part of the donor record.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and "mail merge" type inserted data.
- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor's previous giving history.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails:** Lets you schedule email to send in the future. This is part of a very flexible feature that allows you set up emails to go out based on a number of different criteria, including date.
- **Email Server:** Emails are sent via system-integrated SendGrid, protecting you from blacklisting; SendGrid takes measures to ensure email goes to donors' inboxes rather than their Spam filters.
- **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization.
- **Email Reports:** Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addressed that didn't go through.
- **Automatic Emails:** Lets you set up automatic emails based on certain events, like a Web form submission, but it is not possible to set up a series of automatic emails triggered by certain events.



## Querying

- **General Querying Approach:** Lets you create powerful queries, but the interface to do this is less intuitive than some other tools. To add criteria you must scroll through a long alphabetical list of all system fields, and then set the parameters. Most users will require training to understand what is in each data source.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the filters and criteria from your saved query.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.
- **Packaged Queries:** The system includes several packaged queries.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT).
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** Can create basic ad hoc reports by choosing what columns you want to include, and adding groups or totals.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within ad hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to CSV, Excel, HTML, and RTF format.
- **Distinguishing Reports:** The vendor highlights the 160 packaged reports that come with the system, many of which provide deep analysis of and insight into your fundraising performance.
- **Custom Reports:** Lets you create custom reports through a reports wizard in the internal word processor.
- **Graphical Capabilities:** The system lets you add charts and graphs to reports, but your options are limited.
- **Dashboard Placement:** Lets you place both standard and custom reports on the dashboard. Dashboards can include charts and graphs.
- **Scheduled Reports:** You can schedule a report to run at a specified date, be emailed to users, or can set recurring reports by week, month, year.
- **Reporting Triggers:** The system does not support this functionality.

## Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors’ credit cards within the system.
- **Processing Fees:** Processing fees are set by the payment processor selected.

- **Recurring Gifts:** Lets you set up recurring gifts, which are both logged and charged to donors' credit cards at designated intervals.
- **Web Sign-Up Form:** People can easily sign up for your email list via an integrated sign-up form on your website.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database. They offer a complete form builder that allows you to create an unlimited number of forms, and fully customize their fields, and their position and order.
- **De-Duping Online Actions:** Online sign-ups or payments are logged to donors' existing payment records by name or other contact information which you can specify. These possible duplicates are presented for your confirmation before being logged in the system.
- **Event Registration:** Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket).
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.
- **Distributed/Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts via an integration with a third-party fundraising tool.
- **Membership Dues:** Lets members pay membership dues online. Members can also log in and manage their contact info, profile, and some measure of transactions as well.
- **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart.
- **Payment Form Customization:** Vendor provides functionality to allow you to embed an online payment form into your own website. Additionally, the system provides the ability to create an online payment form which can be somewhat customized to match your website's colors and fonts.
- **Required Fields:** Transaction Amount, First name, Last name, Email Address, ZIP code, and Credit Card fields (card number, expiration date, and card security code) are the only fields required. Users can define additional required fields as needed.
- **Transaction Fees:** The vendor charges a fee of \$1 per paid event tickets and memberships, and 1 percent for each online donation. Processing fees are set by the payment processor selected.
- **Refunds:** Lets you issue refunds through the system. Donors can request refunds through the system, but there is no automation; staff must process the request manually.
- **Mobile Giving:** Can access the donor portal via mobile phones.
- **Self Management of Donor Record:** Lets donors manage their own records.

## Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details:** Cannot manage any table details for an event, such as names of table captains, seating arrangements, or the amount of gifts raised per table. The vendor reports they are currently working on an integration with a third-party provider for this service.
- **Nametags:** Does not let you create name tags for an event. The vendor reports they are currently working on an integration with a third-party provider for this service.
- **On-Site Registration:** Provides point-of-sale functionality to support selling tickets on-site, renewing or purchasing memberships, and even gifting and purchase of other items. The POS is integrated with Square and Stripe. The vendor charges a fee of \$1 per event ticket paid by credit card.
- **Volunteer Interests:** Lets you track a detailed profile of someone's interests and aptitudes, including several different types of information, in order to match volunteers to jobs. Additional functionality to support volunteer management, including self-management of volunteer profiles, is provided as an add-on module at no additional cost for up to 250 volunteers.

- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration, and tasks, but no dollar equivalent for their time. Additional functionality to support volunteer management, including self-management of volunteer profiles, is provided as an add-on module at no additional cost for up to 250 volunteers.
- **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.
- **Peer-to-Peer Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts via an integration with a third-party fundraising tool.
- **Other Interactions:** Custom fields allow additional interactions.

## Accounting Support

- **Existing Integrations:** Lets you create a file format tailored to upload easily into QuickBooks.
- **Approach to Batching:** Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash, and credit payments.
- **Reconciling a Batch:** Lets you mark a batch of payments as “reconciled with accounting.”
- **Controlling Reconciled Donations:** Each gift record is “locked” after a thank you letter is printed or the batch is closed.

## Permissions

- **Permissions:** You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field Level Permissions:** Cannot define user or group permissions on a field-by-field basis.

## Customization

- **Customizing Values:** You can change list values for most fields, including the order of the list.
- **Custom Fields:** Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields:** Cannot rename existing fields.
- **Moving or Deleting Fields:** Cannot move or delete existing fields.
- **Custom Constituent Interactions:** Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization:** Vendor will extensively configure the system to your needs as part of the setup process at no additional cost.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality. However, an extensive API allows access to underlying data and application structure for modifying the system and developing new functionality.

## Integration

- **Existing Integrations:** Can automatically exchange data with MailChimp, DonorSearch, and MorWeb. Vendor reports additional integrations will be launched in the next several months.
- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS, .CSV, and .RTF
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Access to API:** The vendor provides developer access to an API for the system.
- **Third-Party Automation Support:** The vendor does not support third-party automation platforms.

## Ease of Use

- **Ease of Use for Novices:** Moderate. The layout is well organized and generally fairly understandable. However, it's a complex system, and it will take some time to learn.
- **Role-based Interfaces:** The Contact View can be configured to show or hide different sections by user or role. Individual users can configure the layout and order of the sections and other elements displayed.
- **Speed for Expert Users:** Moderate. Once you get used to the interface, it will be much faster to get things done, but there are still a lot of screens and fields to navigate through for many tasks. It doesn't provide a lot of specific functionality to make common tasks faster.

## Support and Training

- **Training:** Vendor provides training, either via the internet or live, at additional cost. Training videos and webinars are available without cost.
- **Manuals and Documentation:** Provides help text throughout the application, as well as a manual and recorded trainings.
- **Support:** Vendor provides unlimited email and chat support without additional cost. Phone support is available for an additional cost based on the subscription level.
- **Roadmap for Planned Upgrades:** The vendor does not provide public release notes or a product roadmap of planned functionality upgrades.
- **User Communities:** There is no online community for users of this system.
- **Social Support:** Vendor maintains a social media presence for the system on Facebook, Twitter, LinkedIn, and YouTube.

## Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

## Product Background

- **History:** Vendor has been in business since 2011; the system has been publicly available since 2012.
- **Clients:** Vendor reports 540 clients for the Fundly CRM product.
- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.

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# LITTLE GREEN LIGHT, BY LITTLE GREEN LIGHT, LLC

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Simple workflows for the entry and retrieval of donor information, strong search capabilities, and a clean screen layout contribute to this product's approachability. This is particularly important for organizations that rely upon part-time users and volunteers to work with the database, as these individuals lack the time to devote to mastering a complex system. Since we last reviewed this system, Little Green Light has added native support for online forms that can support single donations, recurring donations, subscriptions, and tickets—the vendor charges a fee of 1 percent per transaction, capped at \$50 per month, in addition to the transaction fees charged by the payment processor you choose (ProPay or Stripe). Reporting and querying are straightforward, built-in templates for both are especially useful for new users, and the vendor has added a new interface for quickly adding a batch of gifts at once. The system allows for event registration and management, volunteer tracking, and membership tracking. There's still no built-in support for or integrations with accounting—you'll need to export your transactions and manually import them into your accounting software. Users now have more control over customizing the system to their liking, with the ability to add new custom components and fields to the donor record—depending on the extent of components and fields you add, the donor profile can get lengthy and difficult to scan, but you now also have the ability to adjust how these fields are displayed and hide certain fields. Pricing for the system is determined by the number of constituent records you keep: organizations with fewer than 2,500 records would pay \$421 per year, while an organization with up to 20,000 records would pay \$745 per year. Email support and weekly online training sessions are included at no additional cost.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$421
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$421
- **Pricing:** First year (Three users, 20,000 donors) \$745
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$745

## Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a single keyword field, or a form that searches basic contact information including email. It includes a loose name search so that correct spelling isn't critical.
- **Quick Search on Custom Fields:** Lets you find a person or organization by searching data entered into custom fields.
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name or other criteria you specify. The system also encourages you to do a search before adding a new donor record.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. This is a very easy, intuitive process.
- **Batching Gifts:** For ease of reconciling with accounting systems, each donation is automatically assigned to a batch when you process the donations that have not yet been receipted.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface. You can tailor the defaults for a particular set of gifts, but you can't change the fields on the fly.



- **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so.
- **Reminders for Pledges:** Can flexibly configure the system to notify the appropriate staff member(s) with a reminder or via email when a pledge is near due.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer by crediting it as a matching gift, separate from soft credits. It is possible, through customization, to track the status of matching gifts.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund, but you cannot split the gift across multiples of these without entering it as multiple separate donations.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like. Can make it appear as if it were given by someone by crediting from the donor of record, without double-counting. Not the same as solicitor credit.
- **Gift Notes:** The system lets you add free-form notes to a gift. These notes can be queried and reported on.
- **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Stock Gifts:** The system can track the sold value of stock gifts, but not the unsold value.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of” and tributes. Can designate honorees and set notifications for honorees and donors.
- **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.
- **Premiums:** No specific functionality for assigning and tracking premiums.

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate time frame.
- **Do Not Contact:** Lets you display a field near the top of the donor screen to notify staff that a particular person should not be contacted. Donors marked this way are automatically excluded from contact lists.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”), or directional (“boss”; “works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships.

- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.
- **Donor Notes:** A large text area lets you enter and view free-form notes about donors. You can click on a note to get a more detailed view of it, and record the date and time of the contact, and assign follow-up tasks. The system also provides the ability to upload documents for any donor. Lets you query and report on free-form notes about donors.
- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings through either a call log or tasks. Manual communication logs are included in system queries and reports.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters and emails for each donor. Emails generated outside the system can be recorded by emailing them to the system (for example, bcc-ing a unique system email address on emails).
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.
- **Donor Source:** Lets you track the source of a particular donor through custom fields only.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased. The system has a deceased date field that records date of death for deceased donors. Deceased donors are excluded from mailings.
- **Online Integrated Data Cleaning and Appending:** Lets you link to SmartyStreets, a free address verification service, by passing donor information from the system. Verified addresses brought back into the system overwrite the existing address data, and are marked as verified. Lets you link to WealthEngine by passing donor information from the system to this resource. Since the integration is one-way, any data will have to be manually imported into the system. Lets you link to DonorSearch by passing donor information from the system to this resource. Since the integration is one-way, any data will have to be manually imported into the system.
- **Mobile Support:** Lets you access constituent records from mobiles via a mobile web browser. The system is not customized for mobile web browsers.
- **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.
- **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor's social media links to fields in the donor record.
- **Ability to Track Donor Social Media Activities in the System:** Constituents' organization-related social media activities can be captured in the system through use of custom fields.

## Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign a stage to a donor to manage a prospecting workflow. You can also create your own custom stages and track a donor's progression through them, with associated dates. Priorities can only be assigned and tracked as a custom category.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date. Shows the reminder in reports. Shows the reminder prominently on the calendar or in a task list at the appropriate time. Shows the reminder prominently on the homepage along with what is overdue, due, and other filters. Shows the reminder prominently on startup of the application. Can optionally email you a reminder.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date. You have a number of options here—you can assign a task to your organization as a whole, to one or more people, or to a “query” of people based on how they are related to other info in the system.
- **Donor Research:** Lets you link to WealthEngine by passing donor information from the system to this resource in order to provide more information on giving capability and priority. Since the integration is one-way, any data will have to be manually imported into the system. Lets you link to DonorSearch by passing donor information from the system to this resource. Since the integration is one-way, any data will have to be manually imported into the system.

- **Supporter Profiles for Prospecting:** Custom categories or groups can be used to identify supporters who meet the defined criteria.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor from a link on the dashboard.
- **Proposal Tracking:** Lets you track what proposals are due, what you've submitted, and what has already been approved by a particular foundation using custom fields.
- **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest, through custom fields.
- **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts; can record grant probabilities, request and award amounts, payment types, and deliverables. Can record due dates and reminders for grants and assign them to any staff member.
- **Thresholds and Action Triggers:** No special functionality to support thresholds and action triggers.

## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates within the system that include mail-merged information or upload templates created in Microsoft Word that include mail-merged information. You can then mail merge data into those templates through the system, without the need to export data.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates in Word with complete control over layout, formats, logos, and images. Lets you create templates in the system with some control over format, logos, and images, but your ability to create unusual layouts is limited.
- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking that Letters Were Sent:** Automatically logs for each donor that a letter was sent.
- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous:** Automatically creates a queue of people to be thanked as part of the gift entry process. You can then create letters for everyone in the queue at once. Alternatively, you can query to find all those who need to be thanked (for example, by finding recent donors who have not yet been thanked), and create letters for them all at once.
- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor's previous giving history.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime, and attended a particular event).
- **Printing Labels:** Lets you easily print labels for a set of people from the same query result page used to print letters.

## Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records. The system automatically logs the email and saves a copy as part of the donor record.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime, and attended a particular event).

- **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and “mail merge” type inserted data. The system uses the same mail-merging tool for email as it does for printed letters with a few additional email options (specify from/to address for instance).
- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor’s previous giving history.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails:** Cannot schedule email to send in the future.
- **Email Server:** Emails are sent via one of two system-integrated third-party email systems (but this requires a separate subscription to the third-party service), protecting you from blacklisting. The third-party broadcast email system takes measures to ensure email goes to donors’ inboxes rather than their spam filters
- **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization if the organization uses a third-party broadcast email client. Otherwise, donors must contact the organization to unsubscribe from future mailings.
- **Email Reports:** Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on the included links, and bounce reports to allow you to follow up on email addresses that didn’t go through.
- **Automatic Emails:** Lets you set up automatic emails based on certain events that occur in a particular module, such as a web form submission or an automatic receipt for an online donation.

## Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease, by choosing criteria and filters. You can also define “exclusive not” queries which exclude the results for one query from a different one.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.
- **Packaged Queries:** Includes the package queries underlying the standard reports.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT).
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** Can create basic ad hoc reports by choosing what columns you want to include, and adding groups or totals.



- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within ad hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Does not meet this criteria.
- **Exporting Reports:** Lets you export reports to CSV, Excel, and PDF format.
- **Distinguishing Reports:** The vendor highlights onscreen summary giving reports that are exportable with one click, donor retention queries and reports, and the ability to query and report on constituents “by relationship.”
- **Custom Reports:** Lets you create custom reports through a reports wizard with four steps.
- **Graphical Capabilities:** Does not let you add charts and graphs to reports.
- **Dashboard Placement:** Does not let you add reports to the dashboard.
- **Scheduled Reports:** Lets you schedule a report to run automatically at a set date/time.
- **Reporting Triggers:** Does not let you be notified when a goal trigger condition is reached.

## Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors’ credit cards within the system, by entering them into an online form.
- **Processing Fees:** Vendor charges 1 percent of first \$5,000 in processed charges per month. You can choose to use ProPay or Stripe as your gateway provider, which charge their own fees as well. The vendor reports that support for PayPal merchant gateways will be available in April 2017.
- **Recurring Gifts:** Lets you set up recurring gifts which are both logged and charged to donors’ credit cards at designated intervals.
- **Web Sign-Up Form:** People can easily sign up for your email list via an integrated sign-up form on your website.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database.
- **De-Duping Online Actions:** Online sign-ups or payments are logged to donors’ existing payment records by name or other contact information that you can specify. These possible duplicates are presented for your confirmation before being logged in the system.
- **Event Registration:** Lets you accept online registration fees for event including multiple ticket prices (such as a VIP ticket), or meal options.
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.
- **Distributed/Team Fundraising:** Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.
- **Membership Dues:** Lets members pay membership dues online.
- **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart, with the exception of making recurring donations.
- **Payment Form Customization:** Vendor provides functionality to allow you to embed online payment forms into your own website, thus completely matching your website.
- **Required Fields:** Transaction Amount, First Name, Last Name, and Credit Card fields (card number, expiration date, and card security code) are the only fields required. Users can define additional required fields as needed.
- **Transaction Fees:** Vendor charges 1 percent of first \$5,000 in processed charges per month. You can choose to use ProPay or Stripe as your gateway provider, which charge their own fees as well. *The vendor reports that support for PayPal merchant gateways will be available in April 2017.*
- **Refunds:** You must issue refunds through the merchant account, and then log the refund into the system manually.
- **Mobile Giving:** All forms support mobile phones.
- **Self Management of Donor Record:** Does not allow donors to manage their own records.



## Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details:** You can use custom fields to manage table details for an event, such as names of table captains, seating arrangements, or the amount of gifts raised per table.
- **Nametags:** Lets you create nametags for an event via a built-in name tag export function.
- **On-Site Registration:** Does not provide any specific functionality to support on-site registration.
- **Volunteer Interests:** Lets you track a detailed profile of someone's interests and aptitudes, but only with custom fields.
- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration, tasks, mileage, and expenses, but no dollar equivalent for their time.
- **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.
- **Peer-to-Peer Fundraising:** The system does not support peer-to-peer fundraising, but soft credits are supported.
- **Other Interactions:** In addition to the interactions we've covered here, the system offers basic support for -a-Thon events and alumni information for higher education.

## Accounting Support

- **Existing Integrations:** The vendor does not specifically support any existing integrations with accounting systems.
- **Approach to Batching:** Each donation is automatically assigned to a batch in order to ease the reconciliation process with an accounting system. You would typically manually compare reports from the database and your accounting package to reconcile.
- **Reconciling a Batch:** Cannot mark a batch of payments as "reconciled with accounting." You can mark records as being passed to accounting, but this is not quite reconciliation.
- **Controlling Reconciled Donations:** There are no controls in place to prevent someone from editing a payment that has already been reconciled, and thus throwing the system out of balance with the accounting system.

## Permissions

- **Permissions:** You can grant groups access at a functional level for a wide variety of system functions.
- **Field Level Permissions:** Cannot define user or group permissions on a field-by-field basis.

## Customization

- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others. You can change list values for most fields, including the order of the list.
- **Custom Fields:** Lets you add an unlimited number of custom fields, which can be placed on most screens in the system. Some fields can only be added by the vendor, at no additional cost.
- **Renaming Fields:** Cannot rename existing fields.
- **Moving or Deleting Fields:** Lets you move or hide some (but not all) fields within the interface.
- **Custom Constituent Interactions:** Cannot create custom interactions without vendor help in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization:** Vendor reports that they often add fields to customer requests without charge.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality.

## Integration

- **Existing Integrations:** Can automatically exchange data with third-party email clients (SendGrid, Mandrill, MailChimp, and Constant Contact), online form builders (Wufoo and Formstack), SmartyStreets for address verification, Fundraising Report Card for reporting, donor research services (Wealth Engine and DonorSearch), and payment processors (PayPal, Stripe, and ProPay).
- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS and .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data. Imports can be easily “rolled back” by the user. Can do a batch import for the system install, and an “incremental” import for subsequent jobs that adds deduplication functionality.
- **Access to API:** The vendor does not provide developer access to an API for the system, but reports that one is in development.
- **Third-Party Automation Support:** The vendor does not support third-party API automation platforms.

## Ease of Use

- **Ease of Use for Novices:** Easy. The system is carefully designed to be free of clutter, and easy to understand. There are easy step-by-step wizards, searches, and quick lists for many features.
- **Role-Based Interfaces:** It is possible to show or hide different sections based on user role, and control the level of access to sections by role, but it is not otherwise possible to change the layout of the user interface.
- **Speed for Expert Users:** Moderate. The system is not optimally laid out to speed repetitive tasks, although it provides special functionality for some, such as gift data entry. The system is optimized around the needs of novice users, and while all are likely to find it intuitive, experienced development directors may wish for more flexibility and shortcuts to ease repetitive tasks.

## Support and Training

- **Training:** Vendor provides initial orientations via webinar at no additional cost. Training videos are available without cost.
- **Manuals and Documentation:** Provides an online help section with written documentation. Online videos are available at no additional cost.
- **Support:** Vendor provides unlimited email support without additional cost.
- **Roadmap for Planned Upgrades:** Vendor provides release notes in their monthly newsletter and blog, and provides a public opt-in beta period with advance notice for significant changes.
- **User Communities:** Vendor provides an official users group on Facebook.
- **Social Support:** The company has profiles on Facebook, Twitter, and LinkedIn.

## Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

## Product Background

- **History:** Vendor has been in business since 2007; the system has been publicly available since 2009.
- **Clients:** Vendor reports more than 3,000 North American clients.
- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.

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# NEONCRM, BY Z2 SYSTEMS

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NeonCRM is a strong integrated online system with solid support for donor management. It has support for pledges, soft credits, and batches for accounting purposes, and prospect management workflows that let you track the steps taken to convert prospects into active donors. The system automatically logs internally generated communications, and can also log email you send from any other system by including a special email address in the bcc line. Gift data can be easily imported into the system. NeonCRM has very strong functionality for web integration, reporting, querying, and the ability to customize. The system includes more than 50 standard reports, and allows you to build your own custom reports. NeonCRM's web forms help you manage information for event registration, surveys, newsletter sign-ups, as well as for memberships, personal donation pages, online giving, and more. You may choose to allow constituents to log in to NeonCRM to provide restricted member-only pages, or permit people to update profile information, view their giving history and manage recurring donations, renew a membership, or access membership directories. Volunteers may also log in to track volunteer time, mileage, and other details. An iOS app allows your staff to search for donor records, add activities to records, and accept donations. There are 15 direct integrations with the NeonCRM API, including Eventbrite, DonorSearch, MailChimp, QuickBooks, and WealthEngine. In addition, NeonCRM allows for online transactions through seven different gateways, including BluePay, IATS, Authorize.net, ACH Direct, and PayPal Pro, without additional transaction or processing fees. NeonCRM offers three tiers of pricing, with increasing access to external integrations, training, and support. Within each of these tiers, pricing increases with the number of records you need. The entry-level tier, Essentials, allows you to store up to 1,000 records and send up to 8,000 emails per month for \$600 per year, while the top tier, Empower, allows you to store up to 250,000 records and send up to two million emails per month for \$15,600 per year with enhanced support. All tiers allow access for unlimited staff members.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$600
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$600
- **Pricing:** First year (Three users, 20,000 donors) \$4,920
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$4,920

## Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches first name, last name, constituent ID, and email, including a wildcard search so that correct spelling isn't critical.
- **Quick Search on Custom Fields:** Lets you find a person by searching data entered into custom fields in the Advanced Search.
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name or contact information.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. This is a very easy, intuitive process.
- **Batching Gifts:** For ease of reconciling with accounting systems, donations may be entered as part of a batch by adding a batch name.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface, which can be tailored on the fly with the appropriate fields and defaults for a particular set of gifts. This robust interface is set up in a spreadsheet-like format with customizable columns.

- **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. Each pledge must be entered by hand, as opposed to generated based on a payment schedule.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.
- **Reminders for Pledges:** Lets you run a report to see pledges that are near due, and you can manually set a reminder to be proactively notified about a pledge.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge against the employer when you enter the gift to be matched.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund, or split the gift across multiples of these, as well as track the solicitation and sub-solicitation that generated a gift.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Gift Notes:** The system lets you add free-form notes to a gift. These notes can be queried and reported on.
- **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Stock Gifts:** The system can track both the unsold and sold values of stock gifts through custom fields.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of” and tributes. Can designate honorees and set notifications for honorees and donors.
- **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.
- **Premiums:** No specific functionality for assigning and tracking premiums.

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track three phone numbers, three email addresses, and an unlimited number of physical addresses. You can label each of them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate time frame.
- **Do Not Contact:** Lets you display a field near the top of the donor screen to notify staff that a particular person should not be contacted.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”), or directional (“boss”; “works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can define which addresses to share or not to share in relationships.
- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.
- **Donor Notes:** A large text area lets you enter and view free-form notes about donors. You can click on a note to get a more detailed view of it.



- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings. The log includes a timer, which may be useful for organizations that track development time. Manual communication logs are included in system queries and reports.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters and emails for each donor. Emails generated outside the system can be recorded by emailing them to the system (for example, bcc-ing a unique system email address on emails).
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving.
- **Donor Source:** Lets you track the source of a particular donor.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings.
- **Online Integrated Data Cleaning and Appending:** Lets you link to Wealth Engine and DonorSearch by passing donor information from the system to these resources. Since the integration is one-way, any data will have to be manually imported into the system. The vendor will provide an NCOA scan and update records for an additional charge.
- **Mobile Support:** Lets you access constituent records, log activities, and record donations from mobile devices via an iOS application designed specifically for mobile access. The vendor reports an Android application is currently being tested.
- **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.
- **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor's social media links to fields in the donor record.
- **Ability to Track Donor Social Media Activities in the System:** Does not let you track donor social media activities within the system.

## Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date and shows the reminder prominently on the calendar or in a task list at the appropriate time. It also shows the reminder prominently on the homepage.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.
- **Donor Research:** Automatically matches donor information to outside resources in order to provide more information on giving capability and priority via partnerships with Wealth Engine and DonorSearch. They add a star rating system to the top of the donor record. Since the integration is one-way, any data will have to be manually imported into the system.
- **Supporter Profiles for Prospecting:** Custom queries can be used to identify supporters who meet the defined criteria and custom fields can help organize and track these individuals.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor in the Prospects module.
- **Proposal Tracking:** Lets you track what proposals are due, what you've submitted, and what has already been approved by a particular foundation.
- **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest, through custom fields.
- **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts; can record grant request and award amounts, payment types, and deliverables. Can record due dates and reminders for grants and assign them to any staff member.
- **Thresholds and Action Triggers:** No special functionality to support thresholds and action triggers.



## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates within the system that include mail-merged information. You can then mail merge data into those templates through the system, without the need to export data.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac. As all letters are mail merged through the server, it doesn't matter what operating system is running on the desktop computer.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates both in Word and internally with complete control over layout, formats, logos, and images.
- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking that Letters Were Sent:** Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed.
- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface.
- **Batch Processing of Thank Yous:** Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings:** Cannot create letters that include custom gift strings based on a donor's previous giving history.
- **Creating One-Off Letters:** Cannot mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Printing Labels:** After you print out letters, you must navigate to a different interface to print out labels for that mailing. The built-in word processor does not support envelopes or labels, so you'll need to export your data and merge it by hand, for instance with Excel and Word.

## Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records. The system automatically logs the email and saves a copy as part of the donor record.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and "mail merge" type inserted data.
- **Merging Gift Strings into Email:** Cannot send emails that include custom gift strings based on a donor's previous giving history.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails:** Lets you schedule email to send in the future.
- **Email Server:** Emails are sent through the vendor's email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors' inboxes rather than their spam filters. The vendor also provides integration with MailChimp for email campaigns.
- **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization.
- **Email Reports:** Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addresses that didn't go through.
- **Automatic Emails:** Lets you set up automatic emails based on certain events, like a web form submission. You can schedule an email based on a criteria built in the query interface to email any new donors added in the past week. You can also set up sequential emails, which are triggered over time (for instance, a user might receive one email immediately after submitting a form, and then another automatically a week later).

## Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease, by choosing criteria from a well-organized interface. Many queries can be done on one screen, and you choose from all the fields, or set limits up front to reduce the clutter and choices. You can also define “exclusive not” queries—which exclude the results for one query from a different one.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.” They provide particularly powerful yet comparatively easy to use functionality in this area—you can define “exclusive not” queries that exclude the results for one query from a different one.
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the filters and criteria from your saved query. This is all done on one screen, reducing the complexity.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.
- **Packaged Queries:** Includes the package queries underlying the standard reports.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT).
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** Can create basic ad hoc reports by choosing what columns you want to include, and adding groups or totals.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within ad hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to CSV or PDF format.
- **Distinguishing Reports:** The vendor highlights their Income Analysis and Effectiveness Over Time reports, and the ability to share custom reports via hyperlink as distinguishing reports or features.
- **Custom Reports:** Lets you create custom reports through a reports wizard.
- **Graphical Capabilities:** Does not let you add charts and graphs to reports. An integration with Fundraising Report Card allows you to analyze and visualize certain fundraising reports.
- **Dashboard Placement:** Lets you place both standard and custom reports on the dashboard.
- **Scheduled Reports:** You can schedule a recurring activity reminder that includes a link to run a report.
- **Reporting Triggers:** You are not able to be notified when a goal trigger condition is reached.

## Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors’ credit cards within the system.
- **Processing Fees:** The vendor integrates with seven payment gateways. Processing fees are determined by the payment gateway provider selected.

- **Recurring Gifts:** Lets you set up recurring gifts, which are both logged and charged to donors' credit cards at designated intervals.
- **Web Sign-Up Form:** People can easily sign up for your email list via an integrated sign-up form on your website.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database.
- **De-Duping Online Actions:** Online sign-ups or payments are logged to donors' existing payment records, by matching the name and/or email address.
- **Event Registration:** Lets you accept online registration fees for events, including multiple ticket prices.
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.
- **Distributed/Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.
- **Membership Dues:** Lets members pay membership dues online. Members can also log in and manage their contact info, profile, and some measure of transactions as well.
- **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart.
- **Payment Form Customization:** Vendor provides an online payment form, which can be customized to completely match your website.
- **Required Fields:** Transaction Amount, First name, Last name, and Credit Card fields (card number, expiration date, and card security code) are the only fields required. You can allow donors to opt to "pay later," allowing them to skip the Credit Card fields.
- **Transaction Fees:** Vendor does not charge a transaction fee for each payment. Monthly fees and transaction fees are determined by the payment gateway provider selected.
- **Refunds:** You must issue refunds through the merchant account, and then log the refund into the system manually.
- **Mobile Giving:** Can access the donor portal via mobile phones.
- **Self Management of Donor Record:** Lets donors manage their own records.

## Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details:** Lets you manage table details for an event, including names of table captains, seating arrangements, and the amount of gifts raised per table, through an integration with Eventbrite, which requires a paid Eventbrite account.
- **Nametags:** Lets you create nametags for an event via a one-click merge process.
- **On-Site Registration:** Can quickly mark those attending as having arrived by clicking next to their name in the registration roster.
- **Volunteer Interests:** Lets you track a detailed profile of someone's interests and aptitudes, but only with custom fields. Volunteers can use a system-generated application to apply for projects that match their interests.
- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration, tasks, mileage, and expenses, but no dollar equivalent for their time.
- **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.
- **Peer-to-Peer Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.
- **Other Interactions:** In addition to the functionality we've covered here, the system has the ability to create custom surveys, an online store for physical item sales and paid or free digital downloads, custom built websites, as well as pre-built website templates that integrate with the system. The vendor reports that Custom Objects functionality will be released in May 2017.

## Accounting Support

- **Existing Integrations:** Provides API integration with QuickBooks (Online and Desktop).
- **Approach to Batching:** Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash, and credit payments.
- **Reconciling a Batch:** You can mark records as being passed to accounting, but this is not quite reconciliation. The QuickBooks integration automatically locks transactions.
- **Controlling Reconciled Donations:** There are no controls in place to prevent someone from editing a payment that has already been reconciled, and thus throwing the system out of balance with the accounting system. The QuickBooks integration automatically locks transactions, but a user can choose to unlock, edit, and re-sync a transaction.

## Permissions

- **Permissions:** You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field Level Permissions:** Cannot define user or group permissions on a field-by-field basis.

## Customization

- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others.
- **Custom Fields:** Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields:** Cannot rename existing fields.
- **Moving or Deleting Fields:** Cannot move or delete existing fields. Users can hide standard fields.
- **Custom Constituent Interactions:** Lets you create your own custom interactions, in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers), using their form builder.
- **Vendor Customization:** Vendor will customize system to your needs at additional cost, but doesn't often do so.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality.

## Integration

- **Existing Integrations:** Can automatically exchange data with QuickBooks, MailChimp, Klaviyo, Eventbrite, ClickBid, DonorSearch, Wealth Engine, One-Click Politics, Higher Logic, Hospitality Housekeeper, Qgiv, GivBee, and Fundraising Report Card.
- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS, .PDF, or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Access to API:** The vendor provides developer access to an API for the system.
- **Third-Party Automation Support:** The vendor does not currently provide third-party automation platform support, but reports that Zapier support will be coming soon.

## Ease of Use

- **Ease of Use for Novices:** Moderate. The organization of the system relies on many different screens, each with lots of screens and buttons. There's a lot of information on each page, making it sometimes difficult to find features or fields. Less technically savvy users may feel initially overwhelmed.

- **Role-Based Interfaces:** The account record view can be customized by individual user to configure the layout and order of the sections and other elements displayed.
- **Speed for Expert Users:** Moderate. Once you get used to the interface, it will be much faster to get things done, but there are still a lot of screens and fields to navigate through for many tasks. It doesn't provide a lot of specific functionality to make common tasks faster.

## Support and Training

- **Training:** Vendor provides training, either via the internet or live, at additional cost. Training videos, webinars, and a knowledge base are available without cost.
- **Manuals and Documentation:** Provides an online library with videos and written documents.
- **Support:** Vendor provides email support for two users at no additional cost (additional users can access email support for \$25 per month per user). Live chat is available for an additional cost (but included in some packages).
- **Roadmap for Planned Upgrades:** Release notes are available through their support center.
- **User Communities:** The vendor provides an official online community that is accessible to the public, but only logged-in users can contribute.
- **Social Support:** The system has a social media presence on Facebook, Twitter, Google+, and LinkedIn.

## Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

## Product Background

- **History:** Vendor has been in business since 2004; the system has been publicly available since 2004.
- **Clients:** Vendor reports more than 2,100 North American clients.
- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.



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# NONPROFIT SUCCESS PACK, BY SALESFORCE FOUNDATION

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Salesforce offers one of the most flexible and powerful Cloud customer data platforms available. The Nonprofit Success Pack (NPSP) adapts the for-profit Salesforce system to nonprofit organization needs. For example, a system capability gets customized, such as the ability to create campaign lists that pull from standard nonprofit donor reports (such as LYBUNT and/or SYBUNT). Salesforce with the NPSP tracks several types of donations, including gifts, in-kind donations, grants, matching gifts, and membership. You can create nearly any type of query or report you want, because of the underlying Salesforce platform. And a refreshed user interface features a modern design, with more visual elements—including graphs and charts—available in the system. The Salesforce AppExchange ([appexchange.salesforce.com](https://appexchange.salesforce.com)) features hundreds of apps that add features that the NPSP lacks. For example, the default setup lacks online giving capabilities, accounting system integration, event management, and other modules. The AppExchange lists about 60 apps specifically marked for nonprofit use. As a sophisticated Cloud platform, Salesforce also provides an extreme degree of configurability: there's an entire developer platform with APIs and programming capabilities. The system may sometimes be a bit daunting to learn. Salesforce created Trailhead, a Cloud-based learning system designed to put users, admins, and developers on a path to mastery of the system (<https://trailhead.salesforce.com/>). The NPSP is free to add to your Salesforce setup, but you'll need Salesforce licenses to use it. Any 501(c)3 may qualify, and Salesforce will provide your first 10 subscriptions free. Additional Lightning Enterprise Edition subscriptions cost \$432 per subscription per year. If you decide you'll need help, the [Salesforce.org](https://www.salesforce.org) site lists several partners that will assist you for a fee.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$0
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$0
- **Pricing:** First year (Three users, 20,000 donors) \$0
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$0

## Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing account from anywhere in the interface using a form that searches accounts and contacts.
- **Quick Search on Custom Fields:** Lets you find any information by searching data entered into custom fields.
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name or email address. Names are matched on “name classes” (which would identify Judith Smith and Judy Smith as potential duplicates) as well as identical names. Duplicate detection rules may be customized.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields, either by adding a gift from the household account record or adding a new donation.
- **Batching Gifts:** For ease of reconciling with accounting systems, donations may be entered as part of a batch through the quick entry screen by creating a batch name, or associated with a batch after entry by editing the gift and selecting the appropriate batch.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick-entry interface which can be tailored on the fly with the appropriate fields and defaults for a particular set of gifts.

- **Updating Donor Info via Quick Entry:** There are separate quick entry interfaces for gift entry and contact data information. The interfaces are similar, but a user cannot update donor information on the gift quick entry, and vice versa.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** There are no on-screen reminders for outstanding pledges when using the interface to enter new gifts. Open pledges display on account profile pages.
- **Reminders for Pledges:** Lets you run a report to see pledges that are near due or you can manually set a reminder to be proactively notified about a pledge.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry. This tracks the matching amount and whether the match has been paid. Availability of matching gifts must be manually identified by the user.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund, or split the gift across multiples of these, as well as track the solicitation and sub-solicitation that generated a gift.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Gift Notes:** The system lets you add free-form notes to a gift. These notes can be queried and reported on.
- **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Stock Gifts:** The system can track both the unsold and sold values of stock gifts.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.
- **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.
- **Premiums:** Lets you assign and track premiums and record tax deductible amount, but not configured by default.

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate time frame.
- **Do Not Contact:** Lets you mark that a particular person should not be contacted, but staff must check a particular field to see it. Donors marked this way are automatically excluded from contact lists.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”), or directional (“boss”; “works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships. You can define which addresses to share or not to share in relationships.

- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.
- **Donor Notes:** A large text area lets you enter and view free-form notes about donors. You can click on a note to get a more detailed view of it. The system also provides the ability to upload documents for any donor. Lets you query and report on free-form notes about donors.
- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings through either a call log or tasks. Manual communication logs may be included in system queries and reports.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters and emails for each donor. Emails generated outside the system can be recorded by emailing them to the system (for example, bcc-ing a unique system email address on emails).
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen. You can customize this screen to include the fields that are most important to you.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts, the number and amount of gifts this year, and total giving. You can configure this screen to choose the lists and aggregate stats that are most useful to you.
- **Donor Source:** Lets you track the source of a particular donor.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased by checking a field. Deceased donors are excluded from mailings. System logic will make relevant updates due to death, e.g., replacing deceased as head of household.
- **Online Integrated Data Cleaning and Appending:** Lets you verify addresses through Cicero, SmartyStreets, or Google by configuring settings in NPSPFunctionality. Third-party vendors in the AppExchange also offer data cleaning and appending. These vendors may charge a fee.
- **Mobile Support:** Lets you access constituent records and run reports from mobiles via an application designed specifically for mobile access.
- **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.
- **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor's social media links to fields in the donor record. May also view recent Tweets in the system. Additional modules, such as Salesforce's SocialStudio and third-party apps, can extend capabilities.
- **Ability to Track Donor Social Media Activities in the System:** Not core to the system. Salesforce's app, Social Studio, adds the ability to monitor and respond to social conversations.

## Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You can also create your own custom stages and track a donor's progression through them, with associated dates. Includes several engagement plan templates and tasks.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date, and shows the reminder prominently on a calendar or in a task list at the appropriate time. Can display the reminder prominently on the homepage along with what is overdue, due, and other filters.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date. You have a number of options here—you can assign a task to your organization as a whole, or to one or more people.
- **Donor Research:** Functionality for data wealth information is available from third-party applications in the AppExchange, such as WealthEngine. These vendors may charge a fee.
- **Supporter Profiles for Prospecting:** Custom queries and reports may identify engaged supporters who aren't already donors.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by running a report.

- **Proposal Tracking:** Lets you track what proposals are due, what you've submitted and what has already been approved by a particular foundation. This functionality is very detailed, and includes likelihood, links to supporting docs, dates for a site visit, and many other fields.
- **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest, through custom fields.
- **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts; can record grant probabilities, request and award amounts, payment types, and deliverables. Can record due dates and reminders for grants and assign them to any staff member. All information may be used in queries and reports.
- **Thresholds and Action Triggers:** Lets you schedule tasks, email alerts, and reports, with workflow rules.

## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates in Microsoft Word that include mail-merged information. You can then mail merge data into those templates through the system, without the need to export data.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac. It doesn't matter what operating system is running on the desktop computer.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates in Word with complete control over layout, formats, logos, and images.
- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking that Letters Were Sent:** Automatically logs in the donation record that a letter was sent.
- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous:** Automatically creates a queue of people to be thanked as part of the gift entry process. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor's previous giving history, using Microsoft Word's formula functionality.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Printing Labels:** Lets you easily print labels for a set of people from the same query used to print letters.

## Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records. The system automatically logs the email and saves a copy as part of the donor record.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Merging Data into Emails:** Email merge strings are not part of the core system, but third-party applications from the AppExchange offer this functionality. These vendors may charge a fee.
- **Merging Gift Strings into Email:** Email merge strings are not part of the core system, but third-party applications from the AppExchange offer this functionality. These vendors may charge a fee.
- **Graphical Emails:** Can create within Salesforce, or with related Marketing Cloud or Pardot add-ons. Many other options available on the AppExchange.
- **Scheduling Emails:** Lets you schedule email to send in the future with a delay on a workflow, but scheduling mass emails is better done through an email tool.



- **Email Server:** Emails are sent through the vendor's email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors' inboxes rather than their spam filters.
- **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization.
- **Email Reports:** The base system does not provide any reports to help you understand how many opens or clicks an email generated in core. Third-party mail service providers offer this functionality.
- **Automatic Emails:** Add-ons in the AppExchange offer this functionality.

## Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. You can also define "exclusive not" queries—which exclude the results for one query from a different one.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical "ands" and "ors." They provide particularly powerful yet comparatively easy to use functionality in this area - you can define "exclusive not" queries that exclude the results for one query from a different one.
- **Expanding Queries:** Lets you easily limit or expand a query after you've generated the list by editing the filters and criteria from your saved query.
- **Saving Queries:** Lets you save queries to be run again later. Saved queries can be easily shared.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, or export the list.
- **Packaged Queries:** The system includes several packaged queries.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT).
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns in one report, including the donations compared to the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts.
- **Ad Hoc Reports:** Can create basic ad hoc reports by choosing what columns you want to include, and adding groups or totals.
- **Custom Fields in Ad Hoc Reports:** Lets you save the queries that you use to export data to create reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to CSV or Excel format.
- **Distinguishing Reports:** Ability to report on constituents across fundraising and program management in a single report.
- **Custom Reports:** Lets you create custom reports.
- **Graphical Capabilities:** The system lets you add a wide variety of charts and graphs to reports.
- **Dashboard Placement:** Lets you place both standard and custom reports on the dashboard. Dashboards can include charts and graphs.



- **Scheduled Reports:** May schedule reports to run automatically, and send to email, Chatter, or an engagement plan activity.
- **Reporting Triggers:** May configure workflow rules, such as triggering an engagement plan when a donor achieves a total giving amount of \$5,000.

## Payment and Website Integration

- **Processing Credit Cards:** Third-party applications available from the AppExchange offer this functionality.
- **Processing Fees:** Third-party applications available from the AppExchange offer this functionality.
- **Recurring Gifts:** Third-party applications available from the AppExchange offer this functionality.
- **Web Sign-Up Form:** People can easily sign up for your email list via an integrated sign-up form on your website.
- **Online Payments:** Third-party applications available from the AppExchange offer this functionality.
- **De-Duping Online Actions:** Third-party applications available from the AppExchange offer this functionality. The Salesforce NPSP offers sophisticated duplicate detection and merging capabilities.
- **Event Registration:** Third-party applications available from the AppExchange offer this functionality.
- **Online Recurring Payments:** Third-party applications available from the AppExchange offer this functionality.
- **Distributed/ Team Fundraising:** Third-party applications available from the AppExchange offer this functionality.
- **Membership Dues:** The system offers membership record types, and third-party applications available from the AppExchange offer this functionality.
- **Shopping Cart:** Third-party applications available from the AppExchange offer this functionality.
- **Payment Form Customization:** Third-party applications available from the AppExchange offer this functionality.
- **Required Fields:** Third-party applications available from the AppExchange offer this functionality.
- **Transaction Fees:** Third-party applications available from the AppExchange offer this functionality.
- **Refunds:** Third-party applications available from the AppExchange offer this functionality.
- **Mobile Giving:** Third-party applications available from the AppExchange offer this functionality.
- **Self Management of Donor Record:** The Salesforce Community Tool, an optional add-on, offers this capability, as do third-party applications available from the AppExchange.

## Tracking Other Interactions

- **Event Registrants:** Third-party applications available from the AppExchange offer this functionality.
- **Tracking Guests:** Third-party applications available from the AppExchange offer this functionality.
- **Table Details:** Third-party applications available from the AppExchange offer this functionality.
- **Nametags:** Lets you easily create nametags for an event via segmentation and merge to Word template.
- **On-Site Registration:** Does not provide any specific functionality to support on-site registration.
- **Volunteer Interests:** Lets you track a detailed profile of someone's interests and aptitudes, including several different types of information, in order to match volunteers to jobs.
- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration, and tasks.
- **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.
- **Peer-to-Peer Fundraising:** Third-party applications available from the AppExchange offer this functionality.
- **Other Interactions:** As a customizable database, Salesforce may be used to flexibly track almost any data, including grant making, client case records, etc.

## Accounting Support

- **Existing Integrations:** Third-party applications available from the AppExchange offer this functionality.
- **Approach to Batching:** You can make and post batches in order to ease the reconciliation process with an account-

ing system. You would typically manually compare reports from the database and your accounting package to reconcile.

- **Reconciling a Batch:** Cannot mark a batch of payments as “reconciled with accounting” except through custom fields.
- **Controlling Reconciled Donations:** By default, there are no controls in place to prevent someone from editing a payment that has already been reconciled, and thus throwing the system out of balance with the accounting system. However, a client could add a validation rule that would display an error message if another user tried to edit reconciled payments.

## Permissions

- **Permissions:** You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field Level Permissions:** Lets you define user or group permissions on a field-by-field basis and by query, allowing extremely detailed and granular access to specific data based on a saved query.

## Customization

- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others. You can change list values for most fields, including the order of the list.
- **Custom Fields:** Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields:** Lets you rename existing fields at no additional cost.
- **Moving or Deleting Fields:** Lets you move many fields within the interface, or delete them altogether.
- **Custom Constituent Interactions:** Lets you create your own custom interactions in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization:** While the vendor does not provide customization services, the system is extensively customizable by any qualified person. They can refer you to one of many consultants who specialize in Salesforce nonprofit consulting.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality. However, the system supports access to underlying data and application structure for modifying the system and developing new functionality.

## Integration

- **Existing Integrations:** Can automatically exchange data with a wide variety of third-party tools found in the AppExchange.
- **Data Export:** Lets you export all data visible to users into another file format, such as .CSV, .XLS, and others.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Access to API:** Developer API access is available at no extra cost.
- **Third-Party Automation Support:** Both IFTTT and Zapier support is available and can be added from the AppExchange.

## Ease of Use

- **Ease of Use for Novices:** Complex. Many tasks can be done in a number of different ways, and with a number of different clicks. The system is powerful but complicated. Most users will require training, which Salesforce offers via [trailhead.salesforce.com](https://trailhead.salesforce.com) for free.

- **Role-Based Interfaces:** The layout can be substantially customized based on user types or roles.
- **Speed for Expert Users:** Moderate. Once you get used to the interface, it will be much faster to get things done, but there are still a lot of screens and fields to navigate through for many tasks.

## Support and Training

- **Training:** Training is available online for free at <http://trailhead.salesforce.com>. Additional training—including in-person training—is available for a fee.
- **Manuals and Documentation:** Provides full written documentation, a training video library, and a forum area for users to ask questions of other users.
- **Support:** No additional fee for standard support, though Premier Support options are available. Phone, email, and chat support is available and can be accessed from within the application.
- **Roadmap for Planned Upgrades:** Release notes are available before each production push and are publicly accessible in the Power of Us Hub and Github repository. Notes are available on a commit-by-commit basis for each beta package version during the development process.
- **User Communities:** The Salesforce Power of Us hub provides a forum for buyers, partners, non-paying customers, and others involved in the Salesforce philanthropic community.
- **Social Support:** Both Salesforce.org and Salesforce.com have significant social media presence.

## Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain.

## Product Background

- **History:** Salesforce.org/Salesforce Foundation has been in business since 2001; the first version of the NPSP was made available in 2007.
- **Clients:** Vendor reports more than 22,000 clients.
- **Sustainability:** Vendor reports revenue covers all operational and support expenses required to support the product and that, as a not-for-profit organization, all dollars are returned to the community either in the form of philanthropy or ongoing growth of SFDO to be able to support an increasing number of organizations.

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# SALSA CRM, BY SALSA LABS

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In October 2015, Salsa Labs merged with DonorPro, rebranded the product as Salsa CRM, and developed single sign-on integration with the company's Salsa Engage product to extend and enhance the online fundraising and constituent engagement capabilities of the system. As we noted in our 2013 review, the system has strong functionality in every category, and is particularly strong in support for pledges, accounting controls, mail-merging, and reporting (it includes a very nice ad hoc report writer as well as standard reports and the ability to generate cultivation and forecasting reports). The integration with Salsa Engage has brought significant improvements to email marketing and online donations, and gives customers access to peer-to-peer fundraising and advocacy add-on modules. Much of Salsa Engage's functionality is driven by a series of user-friendly wizards, but the visual interface and navigation is very different from the CRM, which may be confusing to novice users. Salsa CRM's user interface is optimized for mobile and is quite usable, with a particularly friendly tool for generating queries and sophisticated capabilities around batch gift entry, including a nice check-scanning module. The system has powerful quick search capability, including phonetic searching to compensate for spelling errors, and this capability now includes searching for data in custom fields. Included modules provide support for events and membership management. In addition, the system provides functionality for human resources functions, inventory management, and patient services, which will be of particular interest to those in the health and human services sector. The company charges a flat monthly fee plus a per-constituent record charge for unlimited users and seats to access all features, functions, and modules. The yearly cost for an organization with 1,000 constituents would be \$2,699, while the yearly cost for an organization with 20,000 constituents would be \$4,968.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$2,699
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$2,699
- **Pricing:** First year (Three users, 20,000 donors) \$4,968
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$4,968

## Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches first name and last name. It includes partial name, wildcard, and Soundex search, so that correct spelling isn't critical.
- **Quick Search on Custom Fields:** Lets you find a person or organization by searching data entered into custom fields.
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name. You are also required to do a search before adding a new donor record.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Batching Gifts:** For ease of reconciling with accounting systems, each donation must be entered as part of a defined batch by the user.
- **Gift Quick Entry Interface:** Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface which can be tailored on the fly with the appropriate fields and defaults for a particular set of gifts.

- **Updating Donor Info via Quick Entry:** The import and quick entry interface lets you automatically create new donors and updates donor contact information when appropriate.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The mapping information can be saved and reused.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.
- **Reminders for Pledges:** Can flexibly configure the system to notify the appropriate staff member(s) with a reminder or via email when a pledge is near due.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge against the employer when you enter the gift to be matched.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund, or split the gift across multiples of these, as well as to track the solicitation and sub-solicitation that generated a gift.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Gift Notes:** The system lets you add free-form notes to a gift. These notes can be queried and reported on.
- **Attaching Documents to Gift or Activity Record:** The system lets a user upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Stock Gifts:** The system can track the symbol, number of shares, and current unsold value of stock gifts. Up-to-date stock quotes can be obtained by including a link to the stock on Yahoo Finance.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees and next-of-kin for tributes.
- **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.
- **Premiums:** Lets you assign and track premiums and record tax deductible amount.

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate time frame.
- **Do Not Contact:** Lets you mark that a particular person should not be contacted, but staff must check a particular field to see it.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”), or directional (“boss”; “works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Householding:** A database record describes a single individual and all their contact information and actions. You can add members to a household on a database record and define the head of the household who will receive mailings. You can see individual giving and other household members in an individual profile but must create a query to see a total of household giving.



- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.
- **Donor Notes:** A large text area lets you enter and view free-form notes about donors. You can click on a note to get a more detailed view of it. The system also provides the ability upload documents for any donor. Lets you query and report on free-form notes about donors.
- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings. Manual communication logs are included in system queries and reports.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters and emails for each donor.
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen.
- **Giving Totals:** Lets you easily see in one click or less from the main donor page all recent gifts and total giving.
- **Donor Source:** Lets you track the source of a particular donor.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased. The system has a deceased date field that records date of death for deceased donors. Deceased donors are color coded on the constituents' list. Deceased donors are excluded from mailings.
- **Online Integrated Data Cleaning and Appending:** Lets you link to Wealth Engine or DonorSearch by passing donor information from the system. Data brought back into the system goes into fields separate from other system fields.
- **Mobile Support:** Lets you access constituent records from mobiles via a mobile web browser. The vendor reports that the interface is not fully responsive, but has been optimized for commonly-used screen dimensions.
- **Attaching Documents to Donor Record:** Lets you attach documents to the donor record and store them as part of the database.
- **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you record a donor's social media links to fields in the donor record.
- **Ability to Track Donor Social Media Activities in the System:** Constituents' organization-related social media activities can be captured in the system if they interact with social posts managed by Salsa Engage.

## Prospecting and Proposals

- **Prospecting Workflow:** Lets you assign both a priority and a stage to a donor to manage a prospecting workflow. You can also create your own custom stages and track a donor's progression through them, with associated dates.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date. Shows the reminder prominently on the cultivation screens along with what is overdue, due, and other filters.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date.
- **Donor Research:** Automatically matches donor information to outside resources in order to provide more information on giving capability and priority via partnerships with Wealth Engine and DonorSearch.
- **Supporter Profiles for Prospecting:** Custom queries can be used to identify supporters who meet the defined criteria and custom fields can help organize and track these individuals.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects:** Lets you easily see the list of donors assigned to you as a solicitor by filtering the cultivation report.
- **Proposal Tracking:** Lets you track what proposals are due, what you've submitted, and what has already been approved by a particular foundation.
- **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest.
- **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts. Can record due dates and reminders for grants and assign them to any staff member.

- **Thresholds and Action Triggers:** Lets you set up tasks to remind you of next actions for donors.

## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates within the system that include mail-merged information. You can then mail merge data into those templates through the system, without the need to export data.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac. As all letters are mail merged through the server, it doesn't matter what operating system is running on the desktop computer.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates with complete control over layout, formats, logos, and images using their built-in word processor. Lets you flexibly create letter templates in Word with complete control over layout, formats, logos and images.
- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking that Letters Were Sent:** Automatically logs for each donor that a letter was sent. A copy of each letter is saved to the donor record.
- **One-off Thank Yous:** Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.
- **Batch Processing of Thank Yous:** Automatically creates a queue of people to be thanked as part of the gift entry process. You can then create letters for everyone in the queue at once.
- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor's previous giving history.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Printing Labels:** Lets you easily print labels for a set of people from the same query result page used to print letters. The system provides advanced functionality in this area. For instance, the font will resize to fit the labels you choose and you can print specific labels on a page of partial labels or barcode envelopes.

## Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records. The system automatically logs the email and saves a copy as part of the donor record.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Merging Data into Emails:** Lets you create individual and group email that includes both standard text and "mail merge" type inserted data.
- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor's previous giving history.
- **Graphical Emails:** Lets you create and save graphical email templates to use in emailing groups.
- **Scheduling Emails:** Lets you schedule email to send in the future.
- **Email Server:** Emails are sent through the vendor's email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors' inboxes rather than their spam filters.
- **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization.
- **Email Reports:** Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports to allow you to follow up on email addresses that didn't go through.

- **Automatic Emails:** Lets you set up automatic emails based on certain events. For example, you can schedule an email based on a criteria built in the query interface, to email any new donors added in the past week. You can also set up sequential emails, which are triggered over time (for instance, a user might receive one email immediately after submitting a form, and then another automatically a week later). Sequential emails can be set to automatically stop after a certain condition is met.

## Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors”, as well as nested or parenthetical operators.
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the query and making changes as required.
- **Saving Queries:** Lets you save queries to be run again later.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.
- **Packaged Queries:** The system includes several packaged queries.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT).
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts. It includes a report to compare your past projections to actual performance, to judge the historical effectiveness of your projections and forecast future efforts.
- **Ad Hoc Reports:** Can create basic ad hoc reports by choosing what columns you want to include, and adding groups or totals.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within ad hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Lets you quickly view favorite reports without navigating a much larger set.
- **Exporting Reports:** Lets you export reports to PDF and Word format or convert to an advanced query report.
- **Distinguishing Reports:** The vendor highlights their cultivation and forecasting reports, pledge drive and pledge summary reports, cumulative giving and year over year reports, as distinguishing features from other systems.
- **Custom Reports:** Lets you create custom reports through a reports wizard in the internal word processor.
- **Graphical Capabilities:** Does not let you add charts and graphs to reports.
- **Dashboard Placement:** Lets you place both standard and custom reports on the dashboard. Dashboards can include charts and graphs.
- **Scheduled Reports:** You cannot schedule a report to run automatically.
- **Reporting Triggers:** The system does not support notification when a goal trigger is reached.

## Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors' credit cards within the system.
- **Processing Fees:** Vendor charges 2.89 percent plus \$0.20 per transaction
- **Recurring Gifts:** Lets you set up recurring gifts, which are both logged and charged to donors' credit cards at designated intervals.
- **Web Sign-Up Form:** People can easily sign up for your email list via an integrated sign-up form on your website.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database. They offer a complete form builder that allows you to create an unlimited number of forms, and fully customize their fields, and their position and order.
- **De-Duping Online Actions:** Online sign-ups or payments are logged to donors' existing payment records by name and email address. Possible duplicates that are not exact matches are presented for your confirmation before being logged in the system.
- **Event Registration:** Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket), or meal options.
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations) which are automatically charged to their credit cards.
- **Distributed/Team Fundraising:** Lets supporters set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts.
- **Membership Dues:** Lets members pay membership dues online. Members can also submit updates to their profile, to update their contact info, for example.
- **Shopping Cart:** Lets supporters purchase multiple items at once, as through a shopping cart, with an optional module at additional charge.
- **Payment Form Customization:** Vendor provides functionality to allow you to embed an online payment form into your own website.
- **Required Fields:** Online donations can be processed with first name, last name, postal address, email address and credit card payment information.
- **Transaction Fees:** Vendor charges 2.89 percent plus \$0.20 per transaction
- **Refunds:** Lets you issue refunds through the system. Donors can request refunds through the system, but there is no automation; staff must process the request manually.
- **Mobile Giving:** All online donation forms are responsive design.
- **Self Management of Donor Record:** Lets donors manage their own records.

## Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid.
- **Table Details:** Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table.
- **Nametags:** Lets you create nametags for an event via a standard mail merge process.
- **On-Site Registration:** Provides a "Day of Event" registration screen optimized for quick entry of walk-up registrants.
- **Volunteer Interests:** Lets you track a detailed profile of someone's interests and aptitudes, including several different types of information, in order to match volunteers to jobs.
- **Volunteer Work Tracking:** May track volunteer activity with custom fields and reports.
- **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates.
- **Peer-to-Peer Fundraising:** System allows constituents to conduct peer-to-peer fundraising campaigns.



- **Other Interactions:** In addition to the interactions we've covered here, the system offers support for advocacy actions including petitions and targeted letters, and tracking service interactions for direct service and medical support organizations.

## Accounting Support

- **Existing Integrations:** Lets you create a file format tailored to upload easily into QuickBooks, MiP, Quicken, MAS 90, and Jenzabar.
- **Approach to Batching:** Lets you create batches of payments in order to ease the reconciliation process with an accounting system.
- **Reconciling a Batch:** Lets you mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations:** A payment can be cancelled and re-entered after reconciliation by those with appropriate permissions by unposting the batch.

## Permissions

- **Permissions:** You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field Level Permissions:** Cannot define user or group permissions on a field-by-field basis.

## Customization

- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others.
- **Custom Fields:** Lets you add an unlimited number of custom fields, which can be placed on most screens in the system.
- **Renaming Fields:** Cannot rename existing fields.
- **Moving or Deleting Fields:** Users can hide but not delete existing fields.
- **Custom Constituent Interactions:** Lets you create your own custom interactions in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers).
- **Vendor Customization:** Vendor will customize system to your needs at additional cost, but doesn't often do so.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality.

## Integration

- **Existing Integrations:** Can automatically exchange data with donor research tools (DonorSearch, Wealth Engine), accounting software (Quickbooks, Jenzabar, Quicken, Peachtree, MAS90), Double the Donation for matching gifts, and Showclix for reserved seat ticketing for events.
- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Access to API:** The vendor provides developer access to an API for the system.
- **Third-Party Automation Support:** The system does not support third-party automation platforms.

## Ease of Use

- **Ease of Use for Novices:** Moderate. The layout is well organized and generally fairly understandable. However, it's a complex system, and it will take some time to learn.
- **Role-based Interfaces:** It is possible to show or hide different sections based on user role, and control the level of access to sections by role. Individual users can configure the layout and order of the sections and other elements displayed.



- **Speed for Expert Users:** Easy. Once you have mastered the system, it becomes quite quick to use. Terminology is easy to understand, and the system provides a fair amount of functionality to optimize time-consuming tasks, like data entry.

## Support and Training

- **Training:** Vendor provides training, either via the internet or live, at additional cost. Training videos, webinars, and the knowledge center are available without cost.
- **Manuals and Documentation:** Provides context sensitive text throughout the application, as well as a written manual. Recorded webinars are also available without charge.
- **Support:** Vendor provides unlimited phone, email, and chat support without additional cost.
- **Roadmap for Planned Upgrades:** Release notes are provided in advance of every release. The vendor shares their product roadmap with clients, but does not make it publicly available.
- **User Communities:** A client forum is available to users.
- **Social Support:** The system has accounts on Facebook and Twitter.

## Installation and Maintenance

- **Installation and Maintenance:** As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

## Product Background

- **History:** Vendor has been in business since 2003; the system has been publicly available since 2004.
- **Clients:** Vendor reports approximately 2,000 North American clients.
- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.

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# SUMAC, BY SUMAC

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While many systems have moved to navigation schemes built around complex menu systems, Sumac pointedly bucks this trend and embraces simplicity. Upon startup, Sumac greets the user with a basic menu of well-labeled buttons that leave no doubt as to how to get started. This straightforward approach carries through most areas of the system's basic functions, like working with donors and gifts, setting pledges, online donations, and setting up one-off "thank you" letters, all of which Sumac handles competently. The basic donor overview, however, could feel cluttered rather than well organized depending on how many modules are installed—this could be an issue in particular for organizations that want to track a lot of different types of things about each constituent. Reporting support is strong with many useful standard reports, although there is no central location to access all reports—instead the relevant reports are listed in each section of the system. The querying functionality is powerful, assisted by a unique visual guide that shows users the number of constituents that will be found by each piece of their complex query before the query is run. Sumac can automatically record accounting information for transactions using the built-in Ledger Entries feature, which can be used to either create reports within the system or exported to a separate accounting tool—transaction reports can be imported directly to QuickBooks with a single click, while you'll need to export and manually import the information into other accounting packages. The system supports broadcast emailing and includes basic delivery reports; messages are sent through the client's servers, potentially exposing them to blacklisting, or they can be exported to a third-party broadcast email client. Because the system is set up around a core set of functionality that is extended by 19 add-on modules, different types of organizations can customize the functionality of the system to meet their specific needs. Pricing for the system depends on the number of users, donor records, and how many add-ons you have selected. Pricing starts at \$240 per year for for the Silver package, including one user, 1,000 records, and choice of any two add-on modules; Sumac Platinum starts at \$4,800 per year for unlimited users, unlimited records, and choice of any five add-on modules. Support is included in the price. For organizations with minimal needs and fewer than 500 donor records, or those looking to try out the system, Sumac also offers a free basic version of the system. While Sumac is an installed system, for an additional \$25 per month, Sumac Cloud allows you to access your database on a Cloud-based server.

## System Summary

- **Pricing:** First year (One user, 1,000 donors) \$240
- **Pricing:** Annual Recurring (One user, 1,000 donors) \$240
- **Pricing:** First year (Three users, 20,000 donors) \$5,500
- **Pricing:** Annual Recurring (Three users, 20,000 donors) \$4,800

## Adding and Tracking Donations

- **Quick Search:** Lets you quickly search the database for an existing person or organization from anywhere in the interface using a form that searches any field in the database.
- **Quick Search on Custom Fields:** Lets you find a person or organization by searching data entered into custom fields through Advanced Search functionality.
- **De-Duping:** The system helps prevent duplicate entries when new people are entered by prompting you with a list of existing people with the same name. Additionally, the system includes a utility to identify and resolve existing duplicate records.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.

- **Batching Gifts:** For ease of reconciling with accounting systems, donations may be entered as part of a batch by creating a batch name, then selecting it on gift entry, or associated with a batch after entry by editing the gift(s) and selecting the appropriate batch.
- **Gift Quick Entry Interface:** Does not provide a streamlined quick data entry interface within the system, although gift data can be imported.
- **Updating Donor Info via Quick Entry:** There is no quick data entry interface.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based on a payment schedule with an add-on module at additional cost.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.
- **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified. With an add-on module at an additional cost, you can manually set a reminder to be proactively notified about a pledge.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry. This tracks the matching amount and whether the match has been paid.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign, or fund. You can split the gift across multiple funds.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to a staff member or other person.
- **Gift Notes:** The system lets you add free-form notes to a gift. These notes can be included in queries.
- **Attaching Documents to Gift or Activity Record:** The system does not let you upload and attach documents to gifts or proposals. It is possible to upload and attach documents to communication records, however.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals. You can classify the donation type to reflect the type of the organizational gift.
- **Stock Gifts:** The system can track the sold value of stock gifts, but not the unsold value.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind, or other gifts.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.
- **Zero Dollar Donations:** The system records the value of goods, services, and other in-kind gifts.
- **Premiums:** No specific functionality for assigning and tracking premiums.

## Managing Donor Information

- **Multiple Contact Methods:** Lets you track three physical addresses (Residence, Business, Vacation) that include phone numbers and email address. You can mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate time frame.
- **Do Not Contact:** Lets you mark that a particular person should not be contacted, but staff must check a particular field to see it. Lets you display an optional, prominent message as a pop-up on the donor screen to notify staff that a particular person should not be contacted.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”), or directional (“boss”; “works for...”), and automatically assigns the appropriate relationships for both donors.

- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Householding:** A database record describes a single individual and all their contact information and actions; you can connect them to others in their household through special relationships.
- **Staff Relationships:** Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.
- **Donor Notes:** A large text area lets you enter and view free-form notes about donors. Lets you query and report on free-form notes about donors.
- **Manual Communication Log:** Lets you keep a manual log of communications such as phone calls or personal meetings. Manual communication logs are included in system queries and reports. Additionally, you can log time spent on activities (including communications), which may be useful for organizations that track development time.
- **Automatic Communication Log:** Automatically stores a record of all system-generated letters and emails for each donor.
- **Donor Dashboard:** Lets you easily see all recent communications and donor actions on one screen.
- **Giving Totals:** Lets you easily see all recent gifts in one click or less from the main donor page. You can drill down from that page to see the number and amount of gifts this year, or total giving.
- **Donor Source:** Lets you track the source of a particular donor.
- **Organizational Profile:** Lets you create a profile for an organization and track the people who work for it.
- **Deceased Donors:** Lets you record donors as deceased by checking a field.
- **Online Integrated Data Cleaning and Appending:** No functionality for online integrated data cleaning and appending.
- **Mobile Support:** No support for mobile devices.
- **Attaching Documents to Donor Record:** Lets you attach documents to the donor record by storing the document's filename and path in the database.
- **Ability to Track/Integrate Social Media Information with Donor Record:** Lets you track website URLs in the donor record.
- **Ability to Track Donor Social Media Activities in the System:** Does not meet this criteria.

## Prospecting and Proposals

- **Prospecting Workflow:** An optional add-on module lets you identify donors who are major gift prospects, with rankings. In addition, the optional Reminders add-on module allows you to define and track custom workflows for managing your prospects.
- **Ticklers:** Lets you create a reminder for yourself for a particular task and date with an add-on module at an additional cost. It shows the reminder prominently on the calendar or in a task list at the appropriate time, shows the reminder prominently on the homepage along with what is overdue and due, shows the reminder prominently on startup of the application, and can optionally email you a reminder.
- **Creating Ticklers for Others:** Lets you create a reminder for someone else to do a task on a particular date with an add-on module at an additional cost.
- **Donor Research:** Does not provide any functionality to automatically match donor information to outside resources in order to provide more information on giving capability and priority, but you can create a ranking of donors for the purposes of identifying prospects with an add-on module at an additional cost.
- **Supporter Profiles for Prospecting:** You can create a ranking of donors for the purposes of identifying prospects with an add-on module at an additional cost.
- **Reporting on Asks:** Lets you create reports that show all the asks that have been made, as well as the gifts.
- **Finding Your Prospects:** Lets you assign prospects to a user as a solicitor using custom relationship types. You can then see a list of donors assigned to you by running a segmentation report. An optional add-on module allows you to assign tasks and schedule reminders to help with finding the donors assigned to you.

- **Proposal Tracking:** Lets you track what proposals are due, what you've submitted and what has already been approved by a particular foundation with an add-on module at an additional cost.
- **Foundation Interest Tracking:** Lets you track a particular foundation's interest areas based on your organization's custom categories of interest with an add-on module at an additional cost.
- **Grant Tracking and Reporting:** Lets you track and report on grants separately from other gifts; can record grant probabilities, request and award amounts, payment types, and deliverables; and can record due dates and reminders for grants with an add-on module at an additional cost.
- **Thresholds and Action Triggers:** No special functionality to support thresholds and action triggers.

## Mail-Merging Letters

- **General Mail Merge Approach:** Lets you create and save letter templates in Microsoft Word or comparable word processor that include mail-merged information. You can then mail merge data into those templates through the system, without the need to export data.
- **Mail Merging on a Mac:** Lets you mail merge letters on a Mac. As all letters are mail merged through the server, it doesn't matter what operating system is running on the desktop computer.
- **Flexibility of Letter and Thank You Templates:** Lets you flexibly create letter templates in Microsoft Word or comparable word processor with complete control over layout, formats, logos, and images.
- **Personalizing Letters:** Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.
- **Tracking that Letters Were Sent:** Automatically logs for each donor that a letter was sent when you confirm that a batch of letters were printed.
- **One-off Thank Yous:** Cannot print a single thank you letter from the gift entry interface.
- **Batch Processing of Thank Yous:** Automatically creates a queue of people to be thanked as part of the gift entry process. You can then create letters for everyone in the queue at once. Alternatively, you can query to find all those who need to be thanked (for example, by finding recent donors who have not yet been thanked), and create letters for them all at once.
- **Mail Merging Gift Strings:** Lets you create letters that include custom gift strings based on a donor's previous giving history.
- **Creating One-Off Letters:** Lets you mail merge a single letter using your choice of letter templates from a donor record.
- **Defining Group to Mail:** Lets you export the appropriate data for an external mail merge or print letters through the system for a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Printing Labels:** Lets you easily print labels for a set of people from the same query result page used to print letters. The system provides advanced functionality in this area. For instance, you can also print specific labels on a page of partial labels and specify machineable formatting.

## Emailing

- **One-Off Email:** Lets you easily send email to particular individuals from their donor records. The system automatically logs the email and saves a copy as part of the donor record.
- **Defining Group to Email:** Lets you send email through the system to a group of people who meet a sophisticated set of criteria (for example, everyone who has donated more than \$500 over their lifetime and attended a particular event).
- **Merging Data into Emails:** The system uses the same sophisticated mail-merging tool for email as it does for printed letters.
- **Merging Gift Strings into Email:** Lets you send emails that include custom gift strings based on a donor's previous giving history.
- **Graphical Emails:** Lets you save graphical email templates to use in emailing groups.



- **Scheduling Emails:** Cannot schedule email to send in the future.
- **Email Server:** Emails are sent via your own email server. This approach incurs a greater risk that your own email domain will be blacklisted.
- **Unsubscribes:** Donors can easily unsubscribe from emails without involving the organization. This requires the Website Integration service, at additional cost.
- **Email Reports:** A basic email delivery report lets you see the opens and the number of clicks for each link.
- **Automatic Emails:** Cannot set up automatic emails based on certain events, like a web form submission.

## Querying

- **General Querying Approach:** Lets you create powerful queries with comparative ease by defining a series of criteria and filters. Many queries can be done on one screen, and you choose from all the fields, or set limits up front to reduce the clutter and choices.
- **Querying Based on Giving:** Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.
- **Querying on Any Field:** Lets you query using criteria from any database field, including custom fields.
- **Complex Queries:** Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.” You can define “exclusive not” queries that exclude the results for one query from a different one.
- **Expanding Queries:** Lets you easily limit or expand a query after you’ve generated the list by editing the query and making changes as required. You can also easily limit or expand a query after you’ve generated the list by editing the filters and criteria from your saved query. This is all done on one screen, reducing the complexity.
- **Saving Queries:** Lets you save queries to be run again later. Saved queries can be easily found in the Search Builder Group in the Field Search tab.
- **Taking Actions on a List:** Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.
- **Packaged Queries:** Does not meet this criteria.

## Reporting

- **Standard Reports:** Lets you easily generate prepackaged reports, including top donors for a particular time frame, and donors by level or stage.
- **Giving Reports:** Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.
- **Comparing Campaign Success:** Lets you compare success metrics for a number of different campaigns, but you cannot see the cost of the campaigns.
- **Reporting on Pledges:** Lets you view pledges, and projected gifts based on pledges, as figures distinct from actual gifts. This requires the optional Pledges module.
- **Ad Hoc Reports:** Can create basic ad hoc reports by choosing what columns you want to include, and adding groups or totals.
- **Custom Fields in Ad Hoc Reports:** Custom fields can be displayed within ad hoc reports.
- **Saving Reports:** Lets you save the queries that you use to export data to create reports.
- **List of Favorite Reports:** Does not meet this criteria.
- **Exporting Reports:** Lets you export reports to .CSV and .TXT format.
- **Distinguishing Reports:** The system has more than 130 built-in reports to analyze data in a variety of ways. Ad hoc reporting is flexible and easy to set up.
- **Custom Reports:** Lets you create custom reports through an easy three-step process.

- **Graphical Capabilities:** Does not let you add charts and graphs to reports.
- **Dashboard Placement:** Does not let you add reports to the dashboard.
- **Scheduled Reports:** Does not meet this criteria.
- **Reporting Triggers:** Does not meet this criteria.

## Payment and Website Integration

- **Processing Credit Cards:** Lets you charge donors' credit cards within the system once you set up an account with one of their 10 payment processing partners.
- **Processing Fees:** Transaction and processing fees are set by the payment processors.
- **Recurring Gifts:** Lets you set up recurring gifts, which are both logged and charged to donors' credit cards at designated intervals but this requires an add-on module at additional cost.
- **Web Sign-Up Form:** People can easily sign up for your email list via an integrated sign-up form on your website. This requires the Website Integration service, at additional cost.
- **Online Payments:** Lets you set up an online payment form on your website and pull online payments automatically into your database.
- **De-Duping Online Actions:** Online sign-ups or payments are logged to donors' existing payment records if the donor logs in. You need to run a de-duping process to find and resolve duplicate contacts in the database.
- **Event Registration:** Lets you accept online registration fees for events through an add-on module for additional cost.
- **Online Recurring Payments:** Lets donors set up recurring payments online (such as monthly donations). This requires the optional Pledges modules. The user must approve recurring monthly payments manually.
- **Distributed/Team Fundraising:** Supporters cannot set up their own fundraising pages with text and images about their own fundraising campaigns in order to solicit donations from their own contacts. *The vendor hopes to release peer-to-peer functionality by late 2017.*
- **Membership Dues:** Lets members pay membership dues online. This requires the Website Integration service, at additional cost.
- **Shopping Cart:** Does not support multiple purchases at the same time.
- **Payment Form Customization:** Vendor provides an online payment form, which can be somewhat customized to match your website's colors and logo.
- **Required Fields:** Transaction Amount, First Name, Last Name, Email Address, Address, and Credit Card fields (card number, expiration date, and card security code) are the only fields required.
- **Transaction Fees:** Vendor does not charge a transaction fee for each payment.
- **Refunds:** You must issue refunds through the merchant account. If the merchant account allows for refunds, they can be handled the same way as accepting a payment.
- **Mobile Giving:** Online donation forms are not currently optimized for access on mobile devices.
- **Self Management of Donor Record:** Lets donors update their address and email, but not manage recurring payments or credit card information.

## Tracking Other Interactions

- **Event Registrants:** Lets you track everyone who has registered for a particular event. Robust event tracking is available through an optional module for additional cost.
- **Tracking Guests:** Lets you track non-paying guests for particular events, and distinguish them from those who paid, with an optional module for additional cost.
- **Table Details:** Lets you manage table details for an event, with an optional module for additional cost.
- **Nametags:** Lets you easily create nametags for an event via their label generator.
- **On-Site Registration:** There is sophisticated support for ticketing and theater style events with an optional module for additional cost.

- **Volunteer Interests:** Lets you track a detailed profile of someone's interests and aptitudes, including several different types of information, in order to match volunteers to jobs. This functionality requires an optional module at additional cost.
- **Volunteer Work Tracking:** Lets you log volunteer activity for supporters, including date, duration, and tasks, but no dollar equivalent for their time through an add-on module at additional cost.
- **Membership Tracking:** Provides functionality to track member levels, payments, and expiration dates through an add-on module at additional cost.
- **Peer-to-Peer Fundraising:** The system does not currently support peer-to-peer fundraising. *The vendor hopes to release peer-to-peer functionality by late 2017.*
- **Other Interactions:** In addition to the interactions we've covered here, the system offers support for auctions, auditions and submissions, awarding grants, case management, course registration, collection management, job search, ticketing, and tour booking. These are all add-on modules available for additional cost.

## Accounting Support

- **Existing Integrations:** Lets you create a file format tailored to upload easily into QuickBooks.
- **Approach to Batching:** Lets you create batches of payments in order to ease the reconciliation process with an accounting system, including separate batches for checks, cash, and credit payments.
- **Reconciling a Batch:** Lets you mark a batch of payments as "reconciled with accounting."
- **Controlling Reconciled Donations:** Each gift record is "locked" after a receipt is printed or the batch is closed.

## Permissions

- **Permissions:** You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field Level Permissions:** Lets you define granular user access to a group of key system fields.

## Customization

- **Customizing Values:** Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others.
- **Custom Fields:** Lets you add up to 60 custom fields to constituent records.
- **Renaming Fields:** Lets you rename some existing fields at no additional cost.
- **Moving or Deleting Fields:** Cannot move or delete existing fields.
- **Custom Constituent Interactions:** Lets you create your own custom interactions in order to track multiple pieces of data about a single interaction (for instance, to track date, title, and audience rating for the lectures delivered by your volunteers). This requires an optional add-on module, at additional cost.
- **Vendor Customization:** Vendor reports that they will add fields to help format a customer's incoming data without charge during data migration.
- **Access to Source Code:** Cannot access the source code in order to update or add functionality.

## Integration

- **Existing Integrations:** Provides a one-click interface to send data to QuickBooks, Intacct, MailChimp, Constant Contact, and CQRC Engage. To bring data back into the system, you would need to import them as you would any other file.
- **Data Export:** Lets you export all data visible to users into another file format, including .CSV and .TXT.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.

- **Access to API:** The vendor does not provide access to an API for the system.
- **Third-Party Automation Support:** The system does not support third-party automation platforms.

## Ease of Use

- **Ease of Use for Novices:** Moderate. The system has a lot of different options and features. The layout is well organized and generally fairly understandable, but the organization of the system relies on many different screens, each with lots of screens and buttons. There's a lot of information on each page, making it sometimes difficult to find features or fields. Less technically savvy users may feel initially overwhelmed.
- **Role-Based Interfaces:** It is possible to show or hide different sections based on user role, and control the level of access to sections by role, but it is not otherwise possible to change the layout of the user interface.
- **Speed for Expert Users:** Moderate. The system is not optimally laid out to speed repetitive tasks, although it provides special functionality for some, such as gift data entry. Once you get used to the interface, it will be much faster to get things done, but there are still a lot of screens and fields to navigate through for many tasks.

## Support and Training

- **Training:** Training videos are available without cost. Vendor provides initial training via the internet at no additional cost, and additional training sessions can be scheduled at additional cost.
- **Manuals and Documentation:** Provides help text throughout the application, as well as a manual and recorded trainings.
- **Support:** Vendor provides unlimited email support for all customers without additional cost. Vendor provides unlimited phone support for Silver level or higher customers.
- **Roadmap for Planned Upgrades:** The vendor provides release notes on planned upgrades to users.
- **User Communities:** There is no online community for users of the system.
- **Social Support:** The vendor has accounts for the system on Facebook and Twitter.

## Installation and Maintenance

- **Installation and Maintenance:** As is typical with an installed system, you will need to install the system to your desktops (with assistance from the vendor), maintain your own infrastructure, and install your own updates. The vendor can also host the system on their own servers, through the Sumac Cloud service; as is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain, as the vendor takes care of the infrastructure and updates.

## Product Background

- **History:** Vendor has been in business since 2003; the system has been publicly available since that time.
- **Clients:** Vendor reports between 1,000-1,500 clients.
- **Sustainability:** The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.

# APPENDICES



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# APPENDIX A: METHODOLOGY

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The research for this report followed a five-step process:

## 1. Define Vendors to Be Included

Based on a preliminary scan of the marketplace, we defined that systems should be included in the report using the following criteria:

- It's intended for use by small organizations as their only database to manage online and offline donors, and is specifically set up to track multiple donations from one donor out-of-the-box.
- An organization with one user and 500 donors could purchase it for less than \$6,000 in the first year.
- More than 100 organizations in North America had actually purchased it for less than \$6,000 as of October 2016.
- No fewer than 100 of its clients are nonprofits, exclusive of churches and membership organizations.
- Some official entity (whether a vendor or an open source governance group) proactively manages the continued development of the system.

Additionally, in order to promote a more diverse list of solutions covered in the report, we asked vendors that provide multiple products in this space to limit the number of systems for our consideration to no more than two per vendor.

We distributed invitations to vendors to fill out a preliminary survey about their systems, pricing, and number of clients in order to be considered for inclusion. We emailed the invitation directly to individual contacts at all vendors who were included in the last version of the report, who have contacted Idealware since that report to let us know they'd like to be included, or who were already known to the Idealware research staff or subject matter experts listed in *Appendix C: Authors and Contributors*, or NTEN, and

then followed up via an additional email to vendors who did not respond.

We then distributed an open invitation to participate through the Idealware blog and social media channels, and on a number of email discussion lists, including NTEN's national list, Progressive Exchange, and Information Systems Forum.

Based on the data gathered in this preliminary survey, we identified 32 systems that met our criteria. This list of vendors was created completely independently from the process of soliciting any vendor for funding.

## 2. Update Review Criteria

In September and October 2016, Idealware contacted four low-cost donor management experts to seek their input on useful changes and additions to the criteria we used to review the systems in the 2013 report. Based on their input, we changed a handful of criteria and added new considerations to take into account in system reviews.

## 3. Complete Summary Reviews

From November through December of 2016, Idealware conducted half-hour demos of all 32 systems identified from the preliminary survey to include in this report. Each vendor was sent some preliminary questions about its system and a list of 10 high-level tasks to be demonstrated; these questions and tasks were designed to investigate the factors most often identified as important and that, in Idealware's experience, most differentiate the systems. Based on these summary reviews, we created a rough preliminary scoring mechanism to compare the systems, and wrote a paragraph summarizing the strengths and weaknesses of each system.

Each summary paragraph was sent to the system vendor (or official representative) to allow them to flag errors, and revised to ensure there were no inaccuracies. Vendors did not have final approval over their own review, but we allowed them to opt for us to not publish their review at all. None of the vendors chose this option.

Following the primary review phase, Idealware became aware of three additional systems not covered by the preliminary survey that met all the requirements for inclusion and were of particular interest to the primary audience. In April 2017, we extended an invitation to those three vendors to conduct a one hour demo of each, bringing the total number of systems reviewed to 35.

## 4. Identify the Top Systems

We selected 12 systems to review in more detail based on our rough preliminary scoring mechanism. This scoring mechanism highly prioritized price and functionality to manage complex gift and donor information, but also considered usability, broadcast email functionality, querying and reporting, and

configurability. We removed one system from consideration after we were unable to schedule a demo with the vendor within our research period, leaving us with 11 systems—our Best Value Shortlist.

## 5. Complete Detailed Reviews

For each of those 11 systems, we conducted two- to three-hour demos, during which we reviewed each system for 155 features and attributes. Prior to the demos, vendors whose systems were included in the Top 11 of the 2013 report were sent the review text from that report to identify anything which may have changed in the years since. Our detailed reviews evaluate each of our Best Value Shortlist systems on these 155 features. We sent the review text based on these criteria to the vendors to allow them to flag errors, and revised them to ensure there were no inaccuracies. Vendors did not have final approval over their own reviews.

Review criteria were grouped into 17 categories, and each system was given a rating for each category based on a rating framework (as defined in our *How We Evaluated the Systems* section).

# APPENDIX B: HOW WE EVALUATED THE SYSTEMS

Each rating assumes that the system also meets the criteria for all previous rating levels—for instance, a system cannot be rated Excellent unless it also meets the criteria for Solid and Fair.

Fair	Solid	Excellent
Adding and Tracking Donations		
<ul style="list-style-type: none"> <li>• Lets you quickly search the database for an existing person.</li> <li>• Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.</li> <li>• Lets you enter pledges for future gifts, including the amount and scheduled date.</li> <li>• Can track a note on a gift.</li> <li>• Lets you add free-form notes to a gift.</li> <li>• Lets you associate gifts with an organization, as opposed to individuals.</li> <li>• Lets you record gifts given “in honor of” or “in tribute to.”</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface. OR Lets you easily map and import donor and gift information in custom file formats.</li> </ul> <p>The system provides functionality to allow at least TWO of the following THREE features:</p> <ul style="list-style-type: none"> <li>• Lets you record zero dollar donations.</li> <li>• Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.</li> <li>• Lets you upload and attach documents to gifts, activities, and/or proposals and stores them as part of the database.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you find a person by searching data entered into custom fields.</li> <li>• When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.</li> <li>• Lets you quickly enter a number of gifts at one time through a streamlined quick entry interface that can be tailored with the appropriate fields and defaults for a particular set of gifts.</li> <li>• Lets you easily map and import donor and gift information in custom file formats without additional charge.</li> <li>• The system can create a full set of pledges based on a payment schedule, which you can then customize as needed.</li> <li>• Lets you assign and track premiums, including the tax deductible amount, potentially via custom fields.</li> <li>• Lets you track the value of stock gifts without the use of custom fields.</li> </ul>

Fair	Solid	Excellent
Managing Donor Information		
<ul style="list-style-type: none"> <li>• Lets you track at least three phone numbers and addresses for each donor, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact methods.</li> <li>• Lets you track relationships between donors and label them (for example, “family member,” “co-worker”) with custom relationship types.</li> <li>• Lets you keep a manual log of communications such as phone calls or personal meetings.</li> <li>• Lets you mark that a particular person should not be contacted.</li> <li>• Lets you track the source of a particular donor.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you create a profile for an organization and track the people who work for it.</li> <li>• Automatically stores a record of all system-generated letters and emails for each donor.</li> <li>• Lets you record donors as deceased.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you track as many phone numbers and addresses as you like.</li> <li>• Lets you track people’s seasonal addresses with effective dates, and automatically switches primary addresses for the appropriate time frame.</li> <li>• Lets you define which addresses should be used for specific types of mailings without the use of custom fields.</li> <li>• Lets you track connections between donors and as many of your own staff members as you like, along with which staff member is responsible for the relationship.</li> <li>• Lets you easily see all recent communications and donor actions on one screen.</li> <li>• Provides specific householding functionality to allow you to easily segment out in a query a list of who should be mailed.</li> <li>• Lets you easily see, in one click or less from the main donor page, all recent gifts, the number and amount of gifts this year, and total giving.</li> <li>• Lets you define directional relationships between donors (“boss”; “works for...”) and the system automatically assigns the appropriate relationships for both donors.</li> <li>• Lets you attach documents to the donor record and stores them as part of the database.</li> </ul>
Social Media Integration		
<ul style="list-style-type: none"> <li>• Lets you record social media profiles within the donor record, potentially via custom fields. OR Lets your supporters set up their own fundraising pages with text and images in order to solicit donations from their own contacts.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets your supporters set up their own fundraising pages with text and images in order to solicit donations from their own contacts.</li> <li>• Lets you record social media profiles within the donor record, potentially via custom fields.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you capture a donor’s social media activities within the donor record without the use of custom fields.</li> <li>• Lets you import address or other information to the donor record from their social media profile(s).</li> </ul>

Fair	Solid	Excellent
<b>Prospecting and Proposals</b>		
<ul style="list-style-type: none"> <li>• Lets you assign both a priority and a stage to a donor to manage a prospecting workflow, at least through custom fields.</li> <li>• Lets you create a reminder for yourself for a particular task and date.</li> <li>• Lets you easily see the list of donors assigned to you as a solicitor by running a segmentation report.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you assign both a priority and a stage to a donor to manage a prospecting workflow without custom fields. OR Lets you define and track a custom workflow.</li> <li>• Lets you track what proposals are due, what you've submitted, and what has already been approved by a particular foundation. OR Lets you track a particular foundation's interest areas based on your organization's custom categories of interest.</li> <li>• Lets you track and report on grants separately from other donations.</li> </ul>	<ul style="list-style-type: none"> <li>• Provides advanced built-in functionality to track prospects OR Provides detailed extensive functionality to define and track a custom workflow.</li> <li>• Can see reminders you or others have set prominently displayed at the appropriate time.</li> <li>• Automatically matches donor information to outside resources in order to provide more information on giving capability OR Provides historical analysis of past estimates to help you improve estimates.</li> <li>• Lets you create reports that show all the asks that have been made, as well as the gifts.</li> <li>• Lets you track a particular foundation's interest areas based on your organization's custom categories of interest without custom fields.</li> </ul>
<b>Permissions</b>		
<ul style="list-style-type: none"> <li>• Can define multiple user groups that have different access to system functionality.</li> </ul>	<ul style="list-style-type: none"> <li>• You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you define user or group permissions on a field-by-field basis.</li> </ul>
<b>Mail-Merging Letters</b>		
<ul style="list-style-type: none"> <li>• Can mail merge data into letter templates without exporting data from the system.</li> <li>• Lets you print letters through the system for a particular group of people who meet a sophisticated set of criteria.</li> <li>• Lets you view and customize individual letters (for example, with personal notes to donors) before printing them.</li> </ul>	<ul style="list-style-type: none"> <li>• Automatically logs for each donor that a letter was sent when you confirm that a batch of letters was printed.</li> <li>• Lets you easily mail merge and print a single thank you letter from the gift entry interface by choosing from a number of letter templates.</li> <li>• Lets you easily print labels for a set of people from the same query result page used to print letters.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you create letters that include custom gift strings based on a donor's previous giving history.</li> <li>• Lets you flexibly create letter templates in Word or OpenOffice with complete control over layout, formats, logos, and images.</li> <li>• Lets you build a queue of people to be thanked by marking them at gift entry. You can then create letters for everyone in the queue at once.</li> </ul>



Fair	Solid	Excellent
<b>Emailing</b>		
<ul style="list-style-type: none"> <li>• Lets you easily send email to particular individuals from their donor records.</li> <li>• Lets you send email through the system to a group of people who meet a sophisticated set of criteria.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you create and save graphical email templates to use in emailing groups.</li> <li>• Lets you create individual and group email that includes both standard text and “mail merge” type inserted data.</li> <li>• Donors can easily unsubscribe from emails without involving the organization.</li> <li>• Lets you see the open rate, click-through rate, and unsubscribe rate for each email.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you send emails that include custom gift strings based on a donor’s previous giving history.</li> <li>• Lets you schedule email to send in the future.</li> <li>• Emails are sent through the vendor’s email server, protecting you from blacklisting issues, and the vendor takes a series of steps to ensure email goes to donors’ inboxes rather than their spam filters. OR Emails are sent through a third-party broadcast email provider, protecting you from blacklisting issues.</li> </ul>
<b>Querying</b>		
<ul style="list-style-type: none"> <li>• Lets you find lists of donors based on a wide set of criteria, including amount given this year, total amount given, number of gifts, and number of gifts this year compared to prior years.</li> <li>• Lets you save queries to be run again later.</li> <li>• Once you have created a list, you can mail merge letters to that list, email to that list, update any field in the database for the list, or export the list.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you query using criteria from any database field, including custom fields if included in the system.</li> <li>• Lets you create complicated queries using an unlimited number of criteria connected with logical “ands” and “ors.”</li> <li>• Lets you easily limit or expand a query after you’ve generated the list by saving the query and editing it again.</li> <li>• The system includes pre-built queries.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you create powerful queries with comparative ease.</li> <li>• Lets you view the results of a query in real-time as you build it.</li> </ul>
<b>Reporting</b>		
<ul style="list-style-type: none"> <li>• Lets you easily generate prepackaged reports, including top donors for a particular time frame, donors by level or stage, donors from Last Year but Unfortunately Not This one (LYBUNT), or donors from Some Year but Unfortunately Not This one (SYBUNT).</li> <li>• Lets you view giving statistics for any time frame you specify, and for any group of donors you can find in a query.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you save reports that you create or modify.</li> <li>• Lets you compare success metrics for a number of different campaigns.</li> <li>• Lets you export any report to a CSV or Excel format.</li> </ul>	<ul style="list-style-type: none"> <li>• Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users, including custom fields.</li> <li>• Lets you quickly view favorite reports without navigating a much-larger set.</li> <li>• Lets you either add a logo to an ad hoc report, OR include data-based charts and graphs in an ad hoc report.</li> <li>• Lets you compare success metrics for a number of different campaigns, including the cost of the campaigns.</li> </ul>
<b>Payment and Website Integration</b>		

Fair	Solid	Excellent
<ul style="list-style-type: none"> <li>• Lets you charge donors' credit cards within the system, potentially via a third-party.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you set up an online payment form on your website and pull online payments automatically into your database, without the need for a programmer.</li> <li>• Lets people easily sign up for your email list via an integrated sign-up form on your website.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets donors set up recurring payments online (such as monthly donations), which are automatically charged to their credit cards.</li> <li>• Lets you accept online registration fees for events, including multiple ticket prices (such as a VIP ticket) and meal options.</li> <li>• Lets members pay membership dues online.</li> <li>• Lets donors manage their own records online. OR Lets donors give via mobile devices.</li> </ul>
Tracking Events		
<ul style="list-style-type: none"> <li>• Lets you track who has registered for a particular event, potentially with custom fields intended to track custom interactions.</li> <li>• Lets you easily create nametags for an event.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you track who has registered for a particular event without using custom fields.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you track non-paying guests for particular events, and distinguish them from those who paid, without using custom fields.</li> <li>• Lets you manage table details for an event, including seating arrangements, and the amount of gifts raised per table, without using custom fields.</li> </ul>
Tracking Other Built-In Interactions		
<ul style="list-style-type: none"> <li>• Provides at least substantial custom field functionality to allow you to reasonably support some basic volunteer or membership information.</li> </ul>	<p>Provides two of the following:</p> <ul style="list-style-type: none"> <li>• Lets you log volunteer activity for supporters, including date, duration, and tasks.</li> <li>• Provides functionality to track member levels, payments, and expiration dates.</li> <li>• Provides substantial built-in support for at least one interaction not covered in the report.</li> </ul>	<p>Provides three of the following:</p> <ul style="list-style-type: none"> <li>• Lets you track a detailed profile of someone's interests and aptitudes, in order to match volunteers to jobs, without using custom fields.</li> <li>• Lets you log volunteer activity for supporters, including date, duration, and tasks, as well as the dollar equivalent for their time, without using custom fields.</li> <li>• Provides functionality to track member levels, payments, and expiration dates, without using custom fields.</li> <li>• Provides substantial built-in support for a number of interactions not covered in the report.</li> </ul>

Fair	Solid	Excellent
<b>Customization</b>		
<ul style="list-style-type: none"> <li>• Lets you customize drop-down values for fields such as campaigns, type of relationships, and many others.</li> <li>• Lets you add at least a few custom fields.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you add at least 50 custom fields.</li> <li>• Custom fields can be placed on many screens in the system.</li> <li>• Lets you create your own custom interactions in order to track multiple pieces of data about a single interaction OR Vendor often adds fields or features to customer requests without charge.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you create your own custom interactions in order to track multiple pieces of data about a single interaction, without the need for a programmer.</li> <li>• Lets you move existing fields within the interface, or delete them altogether.</li> </ul>
<b>Integration</b>		
<ul style="list-style-type: none"> <li>• Can export all data visible to users and import donor and gift data OR Provides a method to allow a programmer to create custom data feeds to an external system.</li> </ul>	<ul style="list-style-type: none"> <li>• Lets you export all data visible to users into another file format.</li> <li>• Lets you map different files of donor and gift information to the proper fields in the system, among a variety of fields, and import the data.</li> <li>• Lets you import data without an additional charge.</li> </ul>	<ul style="list-style-type: none"> <li>• Provides a method to allow a programmer to create custom data feeds to an external system, with access to most fields in the system.</li> </ul>
<b>Accounting Support</b>		
<ul style="list-style-type: none"> <li>• Can export transactions in order to import them to an accounting system.</li> </ul>	<ul style="list-style-type: none"> <li>• Can create and track accounting batches in order to ease the reconciliation process with an accounting system.</li> </ul>	<ul style="list-style-type: none"> <li>• Can mark a batch of payments as “reconciled with accounting.”</li> <li>• There are controls in place to prevent unauthorized people from editing a payment that has already been reconciled.</li> <li>• The system automatically syncs with an accounting system in real-time.</li> </ul>
<b>Ease of Use</b>		
<ul style="list-style-type: none"> <li>• Users can use the system, given enough training.</li> </ul>	<ul style="list-style-type: none"> <li>• The system is at least Moderately easy to use for both novices and experts.</li> </ul>	<ul style="list-style-type: none"> <li>• The system is at least Moderately easy to use for both novices and experts, and is Easy for one of these.</li> </ul>
<b>Support and Training</b>		
<ul style="list-style-type: none"> <li>• Training and support is available, at least from the community.</li> <li>• Provides written documentation.</li> </ul>	<ul style="list-style-type: none"> <li>• Provides extensive documentation, including online documentation, a user community, or videos.</li> <li>• Training and support is available from vendor, potentially at an additional charge.</li> </ul>	<ul style="list-style-type: none"> <li>• The vendor provides initial training over the internet at no additional cost.</li> <li>• The vendor provides phone support for under \$500 per year.</li> </ul>

Fair	Solid	Excellent
<b>Installation and Maintenance</b>		
<ul style="list-style-type: none"> <li>• The system can be installed and maintained by a reasonably qualified IT staff.</li> <li>• The system requires its own server, which you will need to install and maintain.</li> </ul>	<ul style="list-style-type: none"> <li>• As is typical with an installed system, you will need to install the system to your desktops, maintain your own infrastructure, and install your own updates.</li> <li>• The amount of work needed to maintain the system is typical for systems of this type.</li> </ul>	<ul style="list-style-type: none"> <li>• As is typical with hosted systems, the system will be comparatively easy to get up and running and to maintain.</li> </ul>
<b>Product Background</b>		
<ul style="list-style-type: none"> <li>• The vendor reports more than 100 clients. OR The system is built upon a widely-used platform, which itself is used by more than 500 clients.</li> </ul>	<ul style="list-style-type: none"> <li>• The system has been in use for more than three years. OR The vendor reports more than 500 clients.</li> <li>• The vendor reports that the revenue earned from this donor management system covers the personnel and operational expenses required to support it.</li> </ul>	<ul style="list-style-type: none"> <li>• The vendor reports more than 1,000 clients.</li> <li>• The system has been in use for more than five years.</li> </ul>

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# APPENDIX C: AUTHORS AND CONTRIBUTORS

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## Authors

### Kyle Andrei, Senior Researcher

Kyle is responsible for researching software through demos, interviews, and surveys, and using that information to create Idealware's reports and articles. In addition, Kyle also produces Idealware's Ask Idealware videos, drawing on his broadcasting experience. Kyle is a graduate of Indiana State University, where he split his time between managing the student radio station, researching video game communication, and working on local elections. He has used both Salsa by SalsaLabs and Salesforce.com as Idealware's constituent databases. Other than that, he has no experience using or implementing any of these systems.

### Amadie Hart, Contract Researcher

Amadie Hart is a contract writer and researcher for Idealware and the president of Hart Strategic Marketing LLC. Amadie founded the company in February 2012 to provide smart marketing and communications consulting to nonprofits and small businesses. She helps clients develop strategic online marketing plans, create and implement online communications strategies, redevelop website content, make decisions about content management and customer relationship software, and integrate social media into outreach efforts.

### Andy Wolber, Contract Researcher

Andy (@awolber) reviewed 14 of the systems in this report. He writes for TechRepublic, teaches a course on Nonprofit and Government Technology for Grand Valley State University, and advises nonprofits and foundations about technology. He serves on the Technology Advisory Committee of the Grand Rapids Community Foundation, and previously served as Executive Director of NPower Michigan. He holds an MBA/MA in Arts Administration from Southern

Methodist University. (Disclosure: Andy has helped clients select and deploy DonorPerfect, Little Green Light, NeonCRM, NetSuite, The Raiser's Edge, and Salesforce.)

### Chris Bernard, Research and Editorial Director

Chris is a career writer and journalist with two decades of experience in newspapers, magazines, advertising, corporate and nonprofit marketing and communications, and freelance writing. Prior to Idealware, he was managing editor of a newspaper and a senior copywriter at an ad agency. For the past nine years, he's overseen Idealware's editorial and communications efforts. Outside of his work at Idealware, he's an award-winning author and a frequent speaker and lecturer at literary conferences and festivals around the country.

## Contributors

Many thanks to those who provided comments on our criteria for review, and reviewed the final report:

Thomas Groden, *OPEN-ISSUE*

Jordan McCarthy, *TechImpact*

Marc Pitman, *Concord Leadership Group*

Robert Weiner, *Robert L. Weiner Consulting*

Rev. Tracy Kronzak, *TK Endeavors* (Tracy now works at Salesforce Foundation, but was still an independent contractor when she contributed to this report.)

We'd also like to thank all the other staff members of Idealware and NTEN and their contractors and partners who contributed expertise to this report, including Karen Graham, Amy Sample Ward, Jessica Holiday, Eileigh Doineau, Lyndal Cairns, Ash Shepherd, Molly Ahearn, and Naomi Adler Dancis.

In addition, this report would not be possible without the voluntary participation of the vendors whose products we reviewed.



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# APPENDIX D: ABOUT THIS REPORT

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## About Idealware

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits and the philanthropic sector make smart software decisions. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps organizations make the most of their time and financial resources. Visit [www.idealware.org](http://www.idealware.org) to learn more or view our hundreds of free articles, resources, and reports.

## About NTEN: The Nonprofit Technology Network

NTEN: The Nonprofit Technology Network aspires to a world where all nonprofit organizations use technology skillfully and confidently to meet community needs and fulfill their missions. We are the membership organization of nonprofit technology professionals. Our members share the common goal of helping nonprofits use all aspects of technology more effectively. We believe that technology allows nonprofits to work with greater social impact. We enable our members to strategically use technology to make the world a better, just, and equitable place.

NTEN facilitates the exchange of knowledge and information within our community. We connect our members to each other, provide professional development opportunities, educate our constituency on issues of technology use in nonprofits, and spearhead groundbreaking research, advocacy, and education on technology issues affecting our entire community.

## RESOURCE DIRECTORY

It often makes sense to hire a consultant or firm to help you implement or make the most of your donor management system. To help, we've compiled a number of the organizations and individuals that offer services in this area, and DMS vendors. These are paid listings. Neither Idealware nor NTEN has assessed the services or products provided. Conduct your own due diligence before hiring any firm.

## 501 Commons

Seattle, WA | (206) 682-6704 | [www.501commons.org](http://www.501commons.org)

We are pleased to offer consulting for Salesforce, the most popular Donor Management CRM system for nonprofits. Our database consultants combine a deep knowledge of technology with hands-on nonprofit experience. Services include planning, installation, integrations, training, reporting, and leveraging data. We offer low, nonprofit rates.

## AGH Strategies

Washington, DC | (202) 248-6400 | [www.aghstrategies.com](http://www.aghstrategies.com)

Your success with open source software demands an experienced partner. The CiviCRM experts at AGH Strategies are former nonprofit professionals; our development, support, and training programs reflect that background. The CiviCRM code contains dozens of features we have built, and your project—whether basic or custom—will draw on this expertise.

### FEATURED



**BackOffice  
Thinking**

## BackOffice Thinking

West Chester, PA | (610) 709-6570 | [www.backofficethinking.com](http://www.backofficethinking.com)

BackOffice Thinking is a full service consulting firm working almost exclusively with nonprofits. We began in 2006 with a fundamental conviction: organizations that more effectively utilize technology will be better able to serve and engage their constituents.

In the past 10 years, we have led numerous assessment, software selection, design, and implementation projects. We create tight long term partnerships with our clients to transform their back office, web, fundraising, communication, membership, finance, and internal business processes.

In 2016, we worked with about 75% of our clients on their donor management system. Most of the work was in CiviCRM and Salesforce, but we also work with and recommend other systems.



## Bloomerang

Indianapolis, IN | (866) 332-2999 | [www.bloomerang.co](http://www.bloomerang.co)

Bloomerang helps nonprofit organizations to reach, engage and retain the advocates they depend on to achieve their vision for a better world.

Our cloud-based donor management application is rooted in principles of philanthropy, simple to use and focused on empowering your team to achieve remarkable results through enhanced donor loyalty.

Bloomerang is designed to deliver maximum results, maximum utilization by your team and maximum flexibility with no need for additional technology spending on your part.

Plugging in the latest technologies and delivering them with a clean, modern interface and with the added benefit of donor retention insights, our system is your go-to for better fundraising!

## Build Consulting

Washington, DC | (202) 808-3076 | [www.thisisbuild.com](http://www.thisisbuild.com)

Build works exclusively with nonprofits and is passionately independent. We provide technology and data strategy, project leadership, and systems management/support. Build helps organizations leverage technology for Fundraising/Development, including exploring how CRM systems fit within an organization-wide technology and data roadmap.

## BrightStep Partners

San Francisco, CA | (415) 841-3592 | [www.brightsteppartners.com](http://www.brightsteppartners.com)

BrightStep Partners is a boutique strategy and implementation firm for nonprofits considering or using the Salesforce.com platform. We specialize in delivering solutions for environmental, advocacy, LGBT and justice organizations. BrightStep is a thought partner to help you understand “What’s Possible?” and technical partner to implement.



## Cividesk

Denver, CO | (720) 381-3939 | [www.cividesk.com](http://www.cividesk.com)

Cividesk provides affordable cloud solutions for nonprofit organizations. Working exclusively with nonprofits, we believe in providing world-class technology and services at a price you can afford so you can gain efficiencies, increase your impact, and be more successful in achieving your mission.

We provide you with a fully configured CRM, take care of all the technology behind the scenes, and are always available to answer any questions you might have. No surprises: hosting, maintenance, mentoring and unlimited customer support are bundled into a fixed monthly subscription so you can budget your expenses in advance.

We also offer consulting, configuration, integration, data migration, training, and custom development exclusively on CiviCRM.

## ClearView CRM from SofTrek

Amherst, NY | (716) 691-2800 | [www.softrek.com](http://www.softrek.com)

Cloud-based ClearView CRM makes raising money and handling donor services more efficient and effective. ClearView CRM's core database connects all of an organization's fundraising activities, including other applications. The system offers a free mobile app, constituent profiles, reports/dashboards, opportunity management, and operational tools.



## Cloud for Good

Asheville, NC | (855) 536-1251 | [www.cloud4good.com](http://www.cloud4good.com)

Cloud for Good is a certified B Corporation and a Preferred Salesforce.Org Partner specializing in donor management, case management, financial applications, and marketing automation implementations for nonprofit organizations and higher education institutions.

We completed over 1,000 nonprofit implementations, helping our clients create more value with technology.



## Giant Rabbit, LLC

Berkeley, CA | (415) 355-4211 | [www.giantrabbit.com](http://www.giantrabbit.com)

Giant Rabbit provides web and data services for non-profits with a shared focus on building a better future. We partner with our clients to select, plan, design, implement and support public-facing websites and internal donation systems, specializing in Drupal, Salesforce, and CiviCRM.

## Ginkgo Street Labs

Washington, DC | (888) 223-6609 | [www.ginkgostreet.com](http://www.ginkgostreet.com)

Ginkgo Street Labs helps you turn data about your donors, members and volunteers into better engagement and more meaningful results using CiviCRM. We provide implementation services, custom development and managed hosting for CiviCRM. Ginkgo Street Labs is the lead developer for CiviVolunteer, the volunteer management extension for CiviCRM.

### FEATURED



### KELL Partners

Austin, TX | (503) 610-6258 | [www.kellpartners.com](http://www.kellpartners.com)

We work only with nonprofits and only with Salesforce. We've been doing this since 2009 with nonprofits of all sizes ranging from itty bitty to very large name-brand organizations.

We've helped nearly 1,000 nonprofits providing more than 100,000 hours of services. So yep, we'll get your systems up and train your teams for success. We'll get everything aligned in your Salesforce instance. We'll make that data dance and sing.

But just know, behind every project, there are a thousand things you may not see. Passion. Humor. Inspiration. And heart. We offer a free 30-minute consult for nonprofits that would like to learn more about Salesforce and discuss their options. To schedule a consult, visit [kellpartners.com/meetus](http://kellpartners.com/meetus)

## Message Agency

Philadelphia, PA | (215) 546-6496 | [www.messageagency.com](http://www.messageagency.com)

Message Agency is a Philadelphia-based B Corp and web development agency. We support donor engagement through content strategy, web design, database integration, and support. Our services include database integrations, donations and event registration solutions, PCI-Compliant e-Commerce, donor management, and technical consulting.



## MISSION CRM

Toronto, Canada | (647) 381-9225 | [www.missioncrm.ca](http://www.missioncrm.ca)

The first system built upon Microsoft's Dynamics 365 platform, the heart of MISSION CRM is an intelligent, donor management and fundraising system with the capability to truly understand your donors from a 360-degree view—vital in order to propel the virtuous cycle of giving with your donors.

The MISSION CRM system empowers you to take the pulse of your organization's fundraising performance, boost productivity, and elevate your operations. All-inclusive pricing includes a subscription to the MISSION CRM system, Office 365, unlimited constituent records and emails—all hosted by Microsoft.

Everything you need to advance your mission in one place—MISSION CRM, launching April 2017.

## Presspoint

Portland, OR | (202) 455-4852 | [www.presspointcrm.com](http://www.presspointcrm.com)

The only All-in-One system built on the WordPress platform. Fully integrated E-commerce, Events, Grants and Constituent Management extend the flexibility & Ease-of-Use that WordPress is known for. Simple & Secure. If you can publish a blog post, you can fully manage your organization in the same place where you engage the most—on your website.



## Sparkrock

Chicago, IL | (416) 516-0050

[www.sparkrock.com/software/donor-engagement](http://www.sparkrock.com/software/donor-engagement)

The Sparkrock platform brings together all the software you need to successfully operate your growing Nonprofit into one, integrated powerful system.

The Sparkrock Donor Management module allows you to:

- Leverage the benefits of a cloud Donor Management solution built on a robust, modern CRM platform
- Communicate with donors & volunteers in a variety of channels
- Gather crucial information such as relationships, trends & social media intelligence to improve your fundraising efforts
- Meets your most complex requirements including soft credits, gifts in kind, reoccurring donations, pledges etc.



## Swift River Consulting

Portland, OR | (415) 547-0630 | [www.swiftriverconsulting.com](http://www.swiftriverconsulting.com)

Swift River Consulting was founded in 2004 by Meghan Morrison with the sole purpose of helping the nonprofit sector understand how to leverage the power of the Force.com platform for their nonprofit organizations. Since then, Swift River has worked with over 150 nonprofit and social enterprise organizations to help them increase their efficiency, expand their reach and measure their results.

Our services include strategic assessment, configuration, data migration, measurement and evaluation, training and support. We have a combined total of over 40 years of nonprofit-specific experience on our team, and are one of the pioneering Salesforce.org consulting partners.

## Whole Whale

Brooklyn, NY | (201) 230-9705 | [www.wholewhale.com](http://www.wholewhale.com)

Whole Whale is a digital agency that leverages data and technology to increase the impact of nonprofits. We take a holistic approach and tailor our services to the unique needs of each client. Whether that's data analysis, digital strategy, web development, or training, we help nonprofits reach their goals and build capacity within their teams.