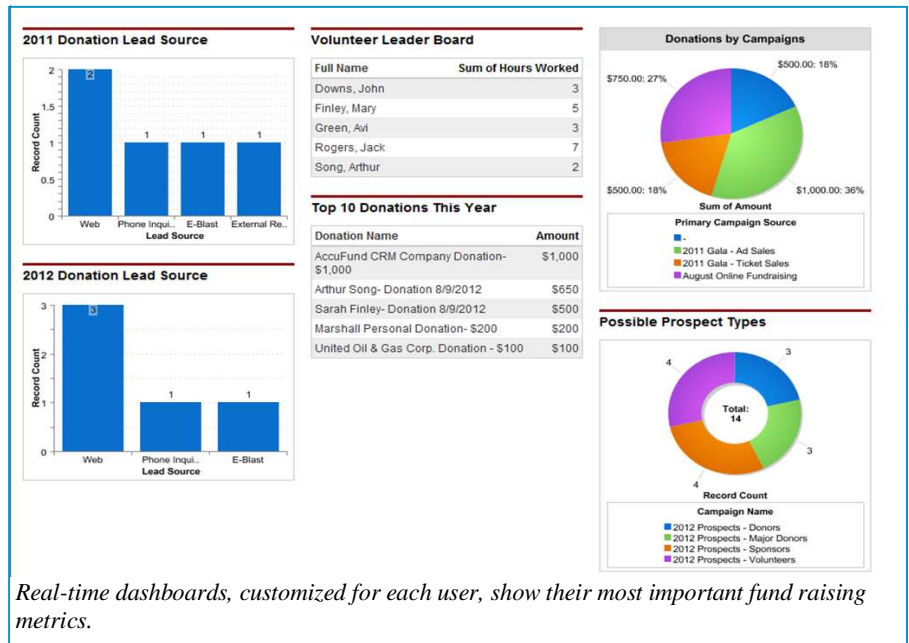# AccuFund CRM

Simplifying Fundraising for Non-Profits

Designed specifically for non-profit and educational institutions, **AccuFund CRM** provides full support for fundraising endeavors by helping you optimize specific activities such as campaigns, donations and email marketing.

AccuFund CRM is a cloud-based solution that resides on the Salesforce Custom Cloud platform, the Force.com. All activity and content within AccuFund CRM is executed through a fully-integrated secured internet browser. Offline and mobile access is also available.

Easy to Use, Flexible User Interface and Home Page

The **AccuFund CRM** user interface is a well-organized layout for accessing and managing the components of the system. The home page is customized for each user and includes their calendar for managing activities, Salesforce Chatter component for managing internal messages with others users and "My Tasks" for creating self-tasks or tasks for other users in the system (e.g. follow-up on a report). The Search field on the Home Page, as well as all pages within the

system, allow you to immediately locate and go to specific campaigns, contacts, donations, reports, etc. The **AccuFund CRM** user interface can be fully integrated with Microsoft Outlook, Google documents and mobile applications.

Real-time dashboards, customized for each user, show their most important fund raising metrics.

AccuFund CRM Core Components

AccuFund CRM includes fully customizable components and features that will help your non-profit Manage all aspects of its fundraising program:

✓ Campaigns
✓ Contacts - donors and volunteers
✓ Donations
✓ Recurring Donations
✓ Direct Mail & Email Marketing
✓ Internal Activities and Tasks
✓ Content Management
✓ Reporting
✓ Relationships
✓ Custom Security Settings

See your calendar for the week or month and with which development opportunity each activity is related. You can see your associates activities and develop group meetings.

Campaign Hierarchy		Campaign Hierarchy Help ?
Campaign Name	Won Donations	Value Won Donations
2011 Gala	0	$0
2011 Gala - Ad Sales	1	$1,000
2011 Gala - Silent Auction	0	$0
2011 Gala - Ticket Sales	1	$500
Hierarchy Total	2	$1,500

Effectively manage parent and child campaigns to track the success of all campaigns within your organization from one screen.
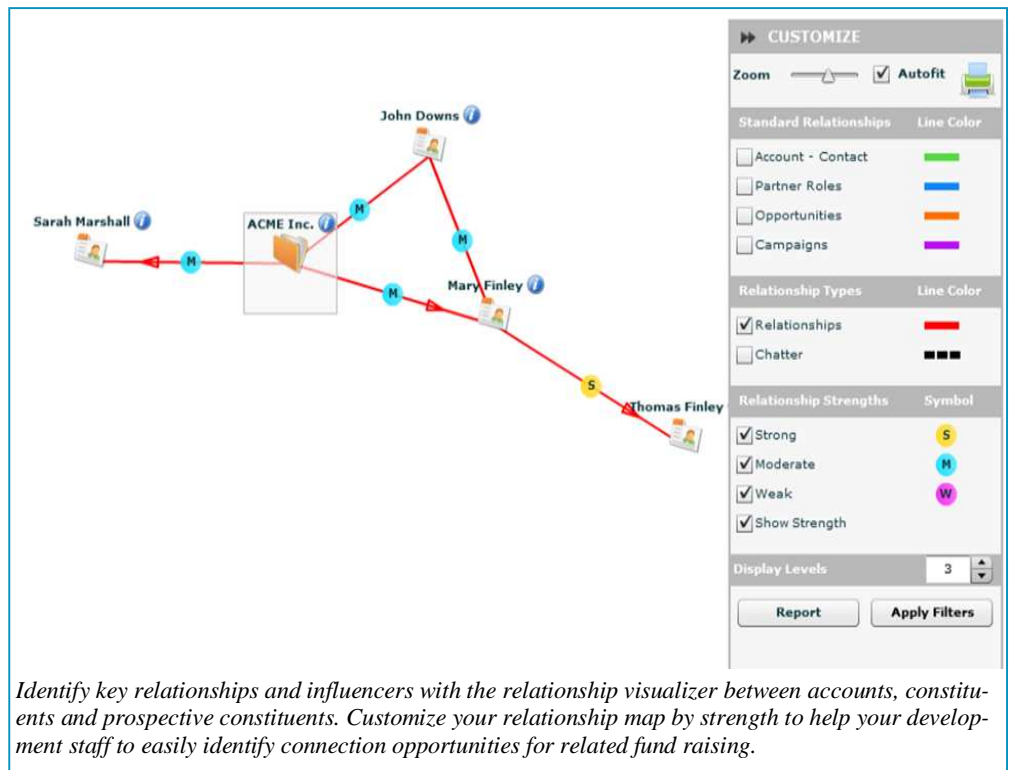
Campaigns

AccuFund CRM allows you to determine the status, progress and level of success with each fundraising campaign.

- ✓ Compile all information and activity on a Campaign, noting its status (in progress, active)
- ✓ Create Campaign types based on the needs of your organization
- ✓ Track donations received from a Campaign – total donations received from members of the organization and other contacts in system
- ✓ View status of members associated with a campaign
- ✓ See whether member "responded," "sent" donation or donation was "received"
- ✓ Manage members in Campaign detail area – obtain information on specific members, such as the number of invitations sent
- ✓ Establish and manage Campaign hierarchy – different campaigns within a parent campaign, a sub-campaign such as a silent auction at a fundraising event
- ✓ Determine any open activities associated with a Campaign
- ✓ Create sections for volunteers associated with a Campaign, recurring donations from a Campaign and approval processes based on qualifications set up in the system.

Contacts

- ✓ Connect contacts (e.g. donors and constituents) to your organization's account records

- ✓ View contact activity such as donations made, average gift, total gifts
- ✓ Customize all fields in contact record – add, change, delete or collapse a field based on your fund-raising needs.
- ✓ Maintain information on volunteers – hours worked, skills provided
- ✓ Manage membership info – type and level of membership that contacts have in your organization
- ✓ Capture audit information – rollups of donation info

Donations

- ✓ Identify all information on donations, such as types of donations, dates donation received, and acknowledgement dates.
- ✓ Allocate donations to specific funds managed by your organization or to the fundraising event or drive generating the donation

Identify key relationships and influencers with the relationship visualizer between accounts, constituents and prospective constituents. Customize your relationship map by strength to help your development staff to easily identify connection opportunities for related fund raising.

- ✓ Manage payment info – **AccuFund CRM** ties into payment gateways for credit card payments

Recurring Donations

- ✓ Manage donations pledged to recur annually, monthly, quarterly, or over a specific period of time (e.g. "$100/

month for 10 months")
- ✓ Create schedule of payments and track actual payments and follow-through on pledges for recurring donations.

Complete	Date	Subject	Name	Related To
X	8/9/2012	Follow Up	Thomas Finley	2011 Gala - Ticket Sales
X	8/15/2012	Email Prospect ❗	Nellie Forrest, LifeTime Fitness	
X	8/23/2012	Confirm Event Venue	Arthur Song	2011 Gala - Silent Auction
X	8/28/2012	Prepare Registration Reports		2011 Gala

Organize your day by creating a virtual "to-do" list on your home page with current and future tasks. Tasks are self-assigned or may be added by others with the right to do so.

Tasks

- ✓ Assigns tasks to your user or colleagues that can be related to donors and volunteers
- ✓ Set up reminders for tasks and include due dates, deadlines and descriptions
- ✓ Create follow-up tasks to proceed emails, calls.

Marketing for Fundraising Campaigns

- ✓ Add third-party applications through AppExchange on Force.com
- ✓ Use Vertical Response for email campaigns:
  - Create emails and track them once they have been sent
  - Use email templates already created in system
  - Provide links in emails to social networks
  - Obtain statistics, such as email open rates, opt-outs, and bounces, number of clicks on hyperlinks
  - Connect with social networks to find contacts' profiles and track which contacts are following

Name	Type	Launch Date	Sent	Open	Click	Bounce	Unsub	
October Gala Invitation	Canvas	Aug 07, 2012 10:28AM	4,524	9.64%	0.71%	1.24%	1.68%	Actions
Fall Volunteer Opportunities	Canvas	Aug 03, 2012 7:31AM	6,092	7.67%	0.33%	24.54%	1.25%	Actions

At a glance, view the success of your email campaigns directly within your CRM solution with summarized statistics. Compare emails results to continuously improve your organization's emailing practices and results

or talking about your organization
  - View email history in contact record detail
- ✓ Use Conga Composer for mail merge templates to create direct mail pieces
  - Select contacts for mail merge – can restrict list by state, previous donation amount and more
  - Choose template for direct mailer, letter or use document from Salesforce.com or your own

computer
  - Log activity regarding contacts receiving the direct mailer and automatically record that info in their contact detail
  - Create follow-up task to check on whether a contact has received the mailer.
- ✓ Use Visual Force (through SalesForce) for automating the process of developing online forms for contact info, registrations
  - Create forms using templates or customize utilizing button types, drop down menus.

Reports & Dashboards

- ✓ Comprehensive reporting and dashboard building
- ✓ Filter reports to show all donations or team donations and the status of those donations
- ✓ Add filters for report data by simply clicking add and typing in filter criteria, such as "donation amounts greater than $500"
- ✓ Select format for report, such as a matrix, summary or tabular columns
- ✓ Schedule reports to run at any time - weekly, monthly, quarterly, or at fiscal quarter or year end - and email the reports to yourself and/or other contacts in **AccuFund CRM**
- ✓ Export reports to Excel or CSV
- ✓ Use Chart Editor for adding a creating and customizing charts with values, such as a funnel, graph, pie

CRM Content Management

- ✓ Set up Libraries for organizing internal content and viewing documents of all file types
- ✓ View members associated with specific documents
- ✓ Identify roles (admins) and permission levels for specific documents, and require passwords if necessary

Prospective constituent snapshots are available at your fingertips, allowing you to categorize, manage and update your prospective constituent records. Easily convert your prospects into constituents once the desired interaction or commitment has been made.

✓ Subscribe members to libraries or document, enabling them to make comments that are available to other members

✓ Offer content or a document as a presentation or webpage in case people don't have the specific program for that content

✓ Integrate with SharePoint to allow workflow and collaboration for document and content creation.

up your account on Force.com, configuring it to the needs of your organization.

Training

Our professional fundraising consultants will train and help you and your team to discover the power of **AccuFund CRM** and gain an overall understanding of the Cloud and the opportunities available on the Force.com Platform.

Application Alignment

We partner with application providers that recognize non-profit organizations by donating the application 100%, or offering a price discount.

Administration

Administrative set up on **AccuFund CRM** is quick and easy. Our consultants provide the training needed to understand all the administrative settings and have full control and navigation capabilities to make the most of our Cloud solution. Administrative set up includes but is not limited to organization profiles, system security permissions, desktop integrations, data management, custom field development, workflow rules, approval processes and user management.

Drill down into an email to discover specific actions taken by your audience. Pull reports based on opens, bounced, clicks, social shares and more to effectively manage your CRM email campaigns.

Support

We offer superior support and maintenance through a professional staff who can address any support questions, training needs, product concerns, application alignment, reporting requirements and any other needs your organization may have concerning **AccuFund CRM**.

AccuFund CRM Set Up

We work with you to review your current fundraising database and locate all data required for the conversion and migration to **AccuFund CRM** and the Cloud. We then set

---

AccuFund, Inc.
www.accufund.com

400 Hillside Avenue, Needham, MA 02494
877-872-2228   781-433-0233   sales@accufund.com