



Kintera's CRM (constituent relationship management) solution helps you centrally record and manage the most important aspects of your relationship with your constituents. Build more complete constituent profiles with extensive standard profiles, accurate wealth scoring, custom fields, and dynamic segmentation. Automatically record both online and offline interactions for a more complete view of your interactions. Track your constituents' relationship with your organization, other members of their household, as well as other constituents in your database. Run campaigns and appeals with greater efficiency and reporting.

We offer both migration and complete database integration solutions services for in house and commercial legacy systems such as GiftMaker Pro, Team Approach™, The Raiser's Edge™, and DonorPerfect. While Kintera Sphere CRM integrates well with most database systems, it can also function as the sole donor management system, meeting your entire database needs.

Kintera's integrated, on-demand open platform offers Marketing, Donor Management / CRM and Accounting solutions to help organizations reach more people, raise more money and run more efficiently.

www.kintera.com

FEATURE HIGHLIGHTS:

Constituent Relationships and Profiles

- LiquidScore** Target your audience and improve direct response ROI with this simple yet accurate wealth score that's included in the CRM product.
- Households** Group individuals into households with aggregated profile and financial information.
- Addresses** Manage multiple sets of custom addresses for each constituent. Set dates indicating when an address is effective to ensure your communications get delivered.
- Salutations** Select from 30 standard salutations or create custom salutations to ensure appropriate personalized greetings in your communications.
- Financials** Record all online and offline purchases and gifts, both single and recurring. Pledges can be managed to track individual giving periods, schedules, and amounts. Track soft credits to recognize those who helped bring in the pledge.
- Interactions** Centrally record your constituents' online and offline activities. Define custom activity types. Enter notes about interactions and manage tasks associated with that constituent.
- Relationships** Identify relationships between constituents such as employer / employee and track relationship dates and details. An integrated Sphere of Influence system visually displays the connections between your prospects.
- Advanced Query Tool** Use the simple Search feature for common fields like Last Name, or an Advanced Query Tool (available with Kintera Sphere CRM only) which allows you to build and save complex queries built against any field.
- Custom Profile Fields** Create and organize custom fields for constituent records. Capture standard and custom profile data through customized online and offline forms. Fees for additional custom fields may apply.
- Segmentation** Use simple folders to create and save segments and mailing lists based on profile, behavioral, and other data categories. Constituents are added to segments while you edit their record, when they submit forms, or when they meet criteria you define.

Additional Products

- Wealth Screening™*** Easily find, profile, monitor and rank the wealth in your database, using the most powerful prospect screening tool available.
- CASE™ Matching Gifts Clearinghouse*** Get details about the matching gift policies of your constituents' employers. Uncover additional streams of gift revenue that you might otherwise be unaware of.



Organizations using CRM can store a common set of biographical, behavioral and historical information from all constituents. Additionally CRM serves as the underlying database to all other Kintera Sphere products, integrating seamlessly with them.

Kintera's integrated, on-demand open platform enables organizations to quickly and easily reach more people, raise more money and run more efficiently - select the Kintera products you need, including: Events, Advocacy, E-mail, Web Site Content Management, Donor Management, Constituent Relationship Management and Accounting.

Constituent Relationships and Profiles

- Unit Types
- Interactions
- Constituencies
- Addresses:
 - Multiple Addresses Per Record
 - Standard and Custom Address Types
 - Effective Dates Per Address
 - Active and Inactive Status
- Salutations:
 - 30 Preset Salutations
 - Custom Salutations
- Salutations Data
- Salutations Logic
- Primary and Secondary Salutations
- Batch Update Salutations
- Financials:
 - History
 - Payments, Gifts, Purchases
 - Outstanding Payments
 - Soft Credits
 - Individual and Household Level
- Relationships:
 - Link Records Together
- 27 Preset Relationship Types
- Custom Relationship Types
- Set Relationship Dates and Details
- Relationship Listing Report
- Households:
 - Link Individuals in Households Together
 - Add Individuals to Household
 - Define Head of Household
 - Household-level Financial Info

Record Features and Types

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

Segmentation

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

Data Entry Forms

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

Custom and Standard Fields

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

Administration*

- Functional Access Groups
- Virtual Accounts

Data Migration and Integration

- Built-in Standard Data Import/Export
- Scheduled Export
- Data Synchronization
- Standard Data Migration/Integration
- Custom Data Migration/Integration
- Highly Experienced DBA Staff
- We Accept Most Industry Standard Formats

Additional Data Management Services

- Wealth Screening™*
- CASE™ Matching Gifts Clearinghouse*
- Address, District and E-mail Appending*
- CASS Certification*

* Additional fees apply.

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