

04



# Contact & Relationship Management System

**ge** giveeffect

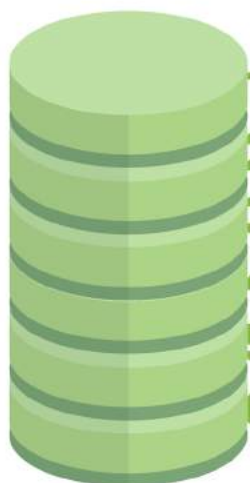
[www.giveeffect.com](http://www.giveeffect.com)

## A Database that's Connected. And Automated.

With the Giveffect database, anything that happens on your website (donations, signups, peer-to-peer fundraising, RSVP, applications, volunteer forms, waivers, scheduling, ticket sales, email campaigns) gets entered automatically into the database. Reminders, tax-receipts, annual statements, pledge invoices are auto-prepared, and much more!

You'll have a complete 360° view of your Constituents, Donors and Volunteers.

### Our Database has 6 core pillars:



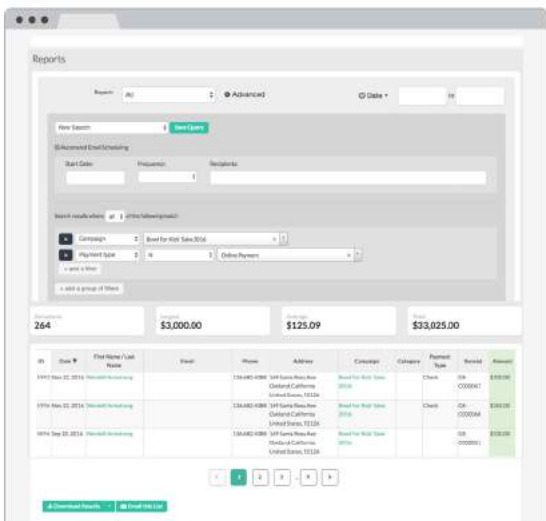
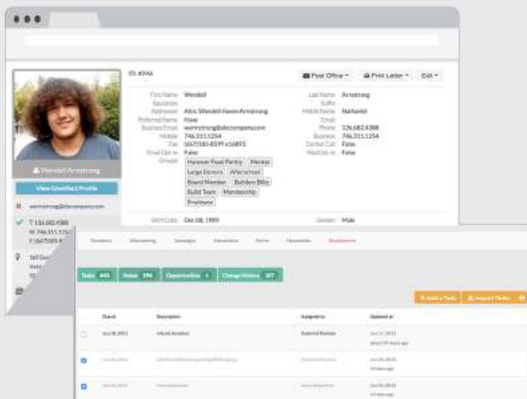
1. **CONTACT & CONSTITUENT** management database
2. **DONOR** management database
3. **VOLUNTEER** management database
4. **MEMBER** management database
5. **MOVES** management / **MAJOR GIFTS** tracking
6. **GRANT** management database

### Features in each Database:

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Individual & Corporate contact profiles | <input checked="" type="checkbox"/> Assign tasks          |
| <input checked="" type="checkbox"/> Contact Auto-complete                   | <input checked="" type="checkbox"/> Log notes             |
| <input checked="" type="checkbox"/> Relationship tracking                   | <input checked="" type="checkbox"/> Mail merge            |
| <input checked="" type="checkbox"/> Custom fields                           | <input checked="" type="checkbox"/> Household group merge |
| <input checked="" type="checkbox"/> Constituent overall visual summary      | <input checked="" type="checkbox"/> Batch gift entry      |
| <input checked="" type="checkbox"/> Pre-authorized credit cards for renewal | <input checked="" type="checkbox"/> Mass custom emails    |
| <input checked="" type="checkbox"/> Annual statements                       | <input checked="" type="checkbox"/> Duplicate checker     |
| <input checked="" type="checkbox"/> Automated reconciliation fields         | <input checked="" type="checkbox"/> NCOA                  |
| <input checked="" type="checkbox"/> User access restricted settings         | <input checked="" type="checkbox"/> Change history        |
| <input checked="" type="checkbox"/> Attributes and groups                   | <input checked="" type="checkbox"/> Full data export      |

## Contact Profiles

Within the database you can see individual supporter's entire activity summary, including the history of donations, volunteering, ticket purchases, event attendance, RSVPs, and document submissions (such as liability waivers).



## Advanced Reporting

At Giveffect we believe you are what you measure. While measuring, tracking and interpreting data on constituents, donors and volunteers is a core function of nonprofit development teams, this task can become difficult with fragmented systems.

If you rely on import/export as a means to gather data then you are only seeing parts of the chapter, not the full story. With Giveffect's connected system, you always get a 360° view on all data points.

- |                                     |                                   |                                     |  |
|-------------------------------------|-----------------------------------|-------------------------------------|--|
| <input checked="" type="checkbox"/> | Advanced custom reports           | <input checked="" type="checkbox"/> | Duplicate checker reporting              |
| <input checked="" type="checkbox"/> | Canned reports                    | <input checked="" type="checkbox"/> | Report customization with search filters |
| <input checked="" type="checkbox"/> | Retention reporting               | <input checked="" type="checkbox"/> | Easy query and date range functionality  |
| <input checked="" type="checkbox"/> | Loyalty reporting                 | <input checked="" type="checkbox"/> | Audit log reporting                      |
| <input checked="" type="checkbox"/> | Constituent data reporting        | <input checked="" type="checkbox"/> | Basic reporting                          |
| <input checked="" type="checkbox"/> | Volunteer reporting               | <input checked="" type="checkbox"/> | Smart queries                            |
| <input checked="" type="checkbox"/> | Financial reconciliation reports  | <input checked="" type="checkbox"/> | Fundraising campaign data analytics      |
| <input checked="" type="checkbox"/> | Quickbooks reports                | <input checked="" type="checkbox"/> | Newsletter and email data analytics      |
| <input checked="" type="checkbox"/> | Sponsor & Corporate reports       | <input checked="" type="checkbox"/> | Volunteer campaign data analytics        |
| <input checked="" type="checkbox"/> | Pledge reports                    | <input checked="" type="checkbox"/> | Constituent data analytics               |
| <input checked="" type="checkbox"/> | Soft credit reports               | <input checked="" type="checkbox"/> | Automated scheduled reporting            |
| <input checked="" type="checkbox"/> | Lifetime giving & In-kind reports | <input checked="" type="checkbox"/> | Custom dashboards                        |



*"The greatest thing about Giveeffect is that everything is in one system. When we were considering which nonprofit software to use, the four key things we were looking for was a volunteer management database, donor management database, online giving system and registration forms. We were really looking for a CRM database that was able to spit out reports and had an easy way for importing data.*

*What I also liked was the e-marketing piece because we can track the data that comes in for everything the donors give and market them with a newsletter. It's also really easy with the Giveeffect nonprofit software to spin out thank you notes and issue tax receipts. Then we follow-up with our Goodwill donors with a phone call."*

**Klassie Alcine - Director of Community Engagement  
Goodwill of Western Missouri & Eastern Kansas**

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## Contact Information

- 01 Online Giving
- 02 Fundraising & Events
- 03 Volunteering
- ▶ 04 Contact & Relationship Management
- 05 Nonprofit Management
- 06 Website & Web Hosting
- 07 Email & Marketing
- 08 Wealth Screening
- 09 Memberships
- 10 Smart Automation

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