



## CONSTITUENT MANAGEMENT

### OUR COMPLETE SUITE INCLUDES:

General Ledger  
Bank Management  
Multi-currency  
Consolidations  
Multiple Languages  
Budget Planning & Control  
Advanced Allocations  
Grant Management  
Investment Management  
Microsoft Excel Report Writer  
Commitments/Encumbrances  
Purchase Requisitions  
Purchase Orders  
Accounts Payable  
EFT and MICR Payments  
Fixed Assets  
Inventory  
Warehouse Management  
Reimbursement Billing  
Accounts Receivable  
Constituent Management  
Human Resources  
Payroll  
Project Management  
Workflow with Approvals  
Revenue Recognition  
Indirect Cost Calculations  
Time and Effort Tracking  
Time and Expense Sheets  
Web Requisitions  
Web Time/Expense Entry

Constituent Management is fully integrated with all core financial areas, enabling the development staff to make contribution entries that flow accurately through the accounting system. This eliminates duplicate entry, ensuring correlation between accounting and development reports, and making the fundraising software a true part of the business solution for the organization.

### CONSTITUENT MANAGEMENT ALLOWS YOU TO:

- Fulfill your organization's mission
- Track and increase the success of your fundraising initiatives
- Cultivate relationships
- Analyze the success of your campaigns
- Manage donor communication preferences
- Specify categories to segment your constituents for targeted mail efforts
- Leverage your investment in Microsoft Office

### FULFILL ORGANIZATION'S MISSION

Not-for-profit development departments are inextricably linked with their accounting departments, yet too many fundraising software packages operate independently of the accounting software. In some cases, fundraising software has had accounting software written to accommodate it. In other cases, fundraising software is linked to for-profit accounting software. With Constituent Management, the fundraising software becomes an integrated part of the overall accounting system, thereby helping organizations to better fulfill their mission.

### TRACK SUCCESS OF FUNDRAISING EFFORTS

Whether you need a detailed report for a fundraising analyst or a quick snapshot for an executive summary, Constituent Management lets you track campaign goals, budgets and actual performance at a glance. Use statistics to assess the trends and performance of a campaign with just one click. Use segments to easily create target groups of your constituents and assign the segment to the appropriate campaign for tracking target populations and response rates.

### CULTIVATE RELATIONSHIPS

With Constituent Management, you can cultivate relationships by tracking extensive biographical data about donors and other constituents. You can track complete address, employment, and education history of constituents. You can track phone/fax/e-mail/web site data separately from mailing address for maximum accuracy and flexibility. You can manage donor communication preferences by type of contact preferred. And you can use Document Matrix to store incoming communication from prospects or donors, grant applications, pictures, articles and other key documents.



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### ABOUT BUSINESS COMPUTING

Business Computing is a Microsoft Certified Gold Partner with over 15 years of experience in providing a comprehensive business management software solution. As a Serenic Business Partner, we specialize in the not-profit and government accounting with a team of software professionals that provide training, implementation and support for Serenic Navigator, the best Not-for-profit software for the middle market.



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### ANALYZE SUCCESS OF CAMPAIGNS

Multiple level Campaign/Appeal/Designation functionality allows you to break your tasks down into the detail you need to track the success of your campaigns. You can track any number of appeals per campaigns, and any number of designations per appeal. The budget, goal, target and response data rolls up from Designations to Appeals to Campaigns to allow high-level campaign analysis of the lower level detail. Designations link to GL posting, ensuring that the fundraising reports from Constituent Management match the finance reports from GL, giving the entire organization access to campaign analysis.

### MANAGE DONOR COMMUNICATION

With Constituent Management you can not only keep track of communications to and from donors and other constituents, you can also plan and execute communication strategies. Using To-Dos and Activities you can create communication tracks and schedule tasks. Using Interactions you can log each communication effort, including detailed notes about a phone call or an electronic copy of a letter. Constituent Management is fully integrated with Microsoft Outlook, so managers can assign and track the status of tasks and calendar items for their staff using the familiar Outlook interface, and each item will be synchronized with Constituent Management so that the full history of communications with a donor can be viewed at a glance.

### SEGMENT CONSTITUENTS FOR TARGETED EFFORTS

Segments in Constituent Management allow for simple and flexible creation of target groups for any communication or solicitation effort. Use Category Groups and Codes to track interests, skills, hobbies, committee involvement – any attribute that you use to track your constituents' interest in or relationship to your organization. Use Segments to create queries using those codes and any other constituent field to create targeted groups, and generate an Interaction directly from the segment, allowing you to simultaneously streamline the list creation process and maximize the effectiveness of your fundraising and communication efforts.

### LEVERAGE MICROSOFT OFFICE

Because we are powered by Microsoft's Navision accounting software platform, you are able to fully leverage your investment in Microsoft Office because of our direct integration with Outlook, Word and Excel. Calendars, tasks, letters and mail activities can be automatically synchronized with Microsoft Office.