



# Donation Tracker

## Product Fact Sheet

Designed specifically for United Way offices, Donation Tracker is the most cost effective Campaign Management Software/CRM tool available. With our CRM features, including our integration with Constant Contact and our Accounting Interface designed for QuickBooks®, Donation Tracker has all the tools you will need to successfully manage your campaigns, year after year.

### General

- ◆ Customer Relationship Management (CRM) features
  - Activity (call reports, journals, tasks, correspondence) recording
  - Loyal contributor tracking
  - Measurement reports
  - Integration with Constant Contact
- ◆ User defined Campaign Map used to segment your donor base
  - Three levels deep
  - Assign contacts at each level
  - Assign goals for each level
- ◆ Ability to differentiate between agency types
- ◆ Ability to limit system users to specific program functions
- ◆ Unlimited number of campaign years
- ◆ Flexible search options
- ◆ Comprehensive audit trail of transactions
- ◆ Accounting Interface designed for use with QuickBooks®

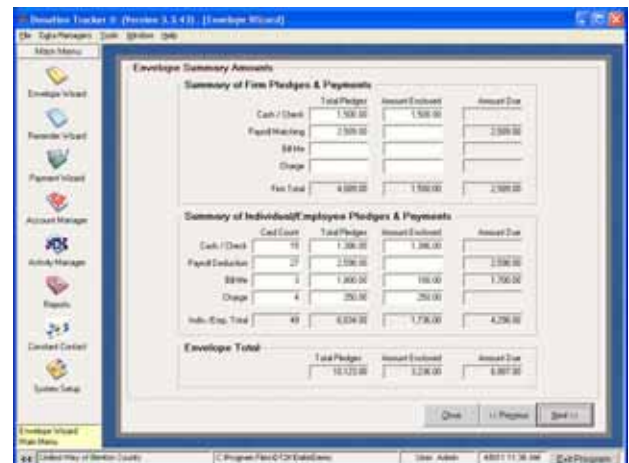


### Reminders/Bills & Payments

- ◆ Full amount or periodic billing by campaign
- ◆ Flexible search options to help identify proper accounts when posting payments
- ◆ Ability to re-print reminders on demand
- ◆ Ability to record payments included with campaign envelopes or as received
- ◆ Single payment liability for payroll deduction

### Campaign Envelope/Pledge Entry

- ◆ Ability to record pledges, payments, and designations in one simple process
- ◆ Internal system checks to help ensure accuracy
- ◆ Tracks gifts raised from special events
- ◆ Multiple billing frequency options with donor specific start date
- ◆ On-screen balancing of campaign envelopes with donor cards
- ◆ Campaign envelopes tracked by batch numbers and/or envelope numbers
- ◆ Ability to add/update accounts during pledge entry
- ◆ Designed to help eliminate duplication of accounts during pledge entry
- ◆ Accommodates “Employee Fund” pledges where specific donor information is unknown
- ◆ Ability to add designated agencies during pledge entry
- ◆ Accommodates multiple designations per pledge
- ◆ Accommodates multiple pledge types
- ◆ User defined payment types
- ◆ Easy and auditable adjustments



## Accounts

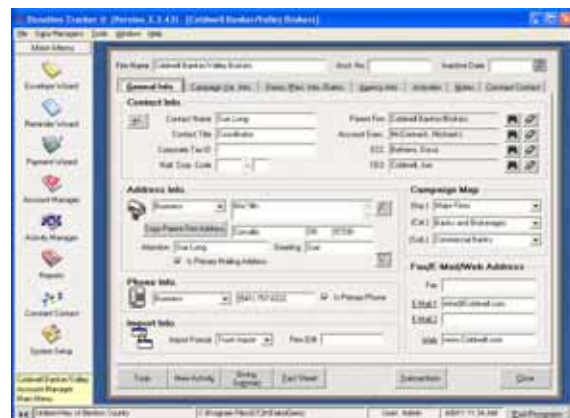
### ◆ Tracks individual/employee donors

- User defined individual grouping capabilities for printing letters, mailing labels, and reports
- Multiple address, phone types, and emails per account
- Advanced searching capabilities
- *Ability to:*
  - ◇ Mass assign account information
  - ◇ Combine duplicate accounts
  - ◇ Link individuals to an employer
  - ◇ Flag individuals as anonymous donors
  - ◇ Link non-employees to the Campaign Map/Divisions
  - ◇ View/adjust individual pledge information by campaign
  - ◇ Combine giving between two individuals (i.e. spouse, partner)



### ◆ Tracks firm donors

- Multiple address, phone types, and emails per account
- Tracking of solicited, thanked, and complete for the current campaign
- Accommodates parent/subsidiary firm relationships
- Tracks number of employees by campaign
- Tracks projected and reported totals by campaign
- Tracks firm campaign start and end dates
- Advanced searching capabilities
- *Ability to:*
  - ◇ Mass assign account information
  - ◇ Combine duplicate accounts
  - ◇ View/adjust firm pledge information by campaign
  - ◇ Assign Account Executives by campaign
  - ◇ Assign Employee Campaign Coordinators by campaign
  - ◇ Assign Industry Type and National Corporate Codes



## Reports, Letters, Labels, & Envelopes

- ◆ Numerous reports (including churn, database II, designations), letters templates, mailing labels, and envelope templates are included in Donation Tracker.
- ◆ Custom report writing included with yearly support

## Donation Tracker Pricing & Optional Modules

- ◆ The purchase price of Donation Tracker is \$5,495 for a Metro 7 and \$5,995 for a Metro 6 and larger
- ◆ Yearly Support & Maintenance (after first year) for a Metro 7 is \$1,300 and Metro 6 and larger is \$1,325
  - Includes unlimited technical support, staff training, custom report writing, updates and upgrades for an entire year
- ◆ Optional add-on modules available
  - Accounting Interface (Designed for QuickBooks®)
  - Data Import Routine
  - Credit Card Processing
  - Multiple Database



Contact Cascade Data Solutions for more information on Donation Tracker

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