Fundraising **Pro**

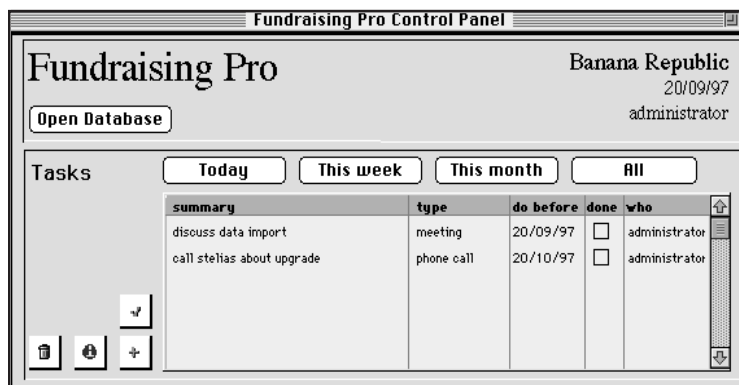© **Stelias Computing Inc.**

The professional fund-raising management system for non-profit organisations.

Fundraising Pro helps you in the daily management of your contacts and donors. It is an integral operational and strategic tool for non-profit organisations which track a constituency with an aim to raising funds. It will adapt suitably to most sizes and types of non profit organisations.
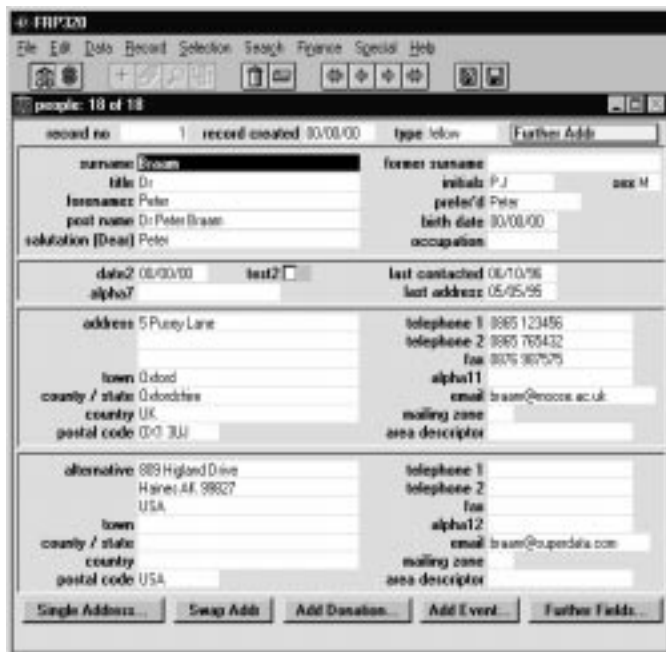
Plan and control your activities and those of your staff

Fundraising Pro includes a powerful contact management tool that allows you to set phone calls, to-dos and meetings associated to a particular contact, group or simply for your personal organisation. With Fundraising Pro you are totally in control, become better organised and more efficient in your daily work.

Your daily task lists will help you efficiently organise your time and activity

*"The package is so easy to use......
.....I never opened the manual"*
Roger Boden , Keble College, Oxford.

Have all the relevant information at the touch of your hand.

Easily gather all the relevant information you need about your contacts through a set of customisable fields and menus.
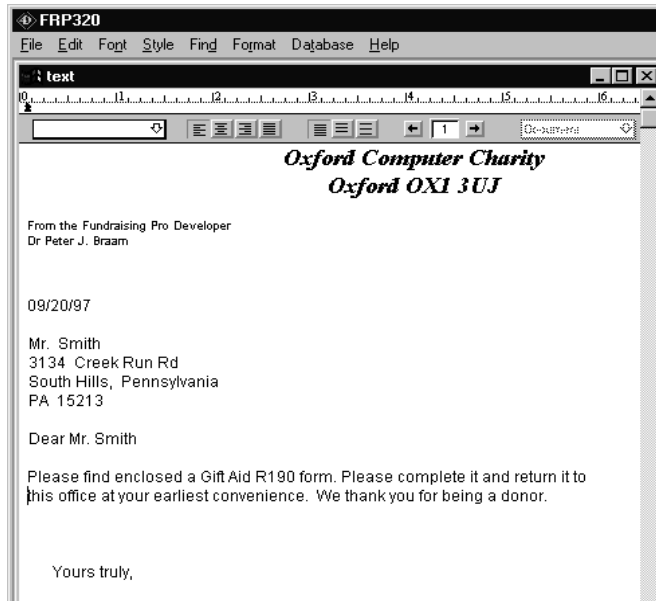
Keep track of the history associated with each of your contacts: donations, calls, meetings, letters and so on.

Associate your contacts easily in particular groups to organise events, mailings, telephone fundraising and other activities.
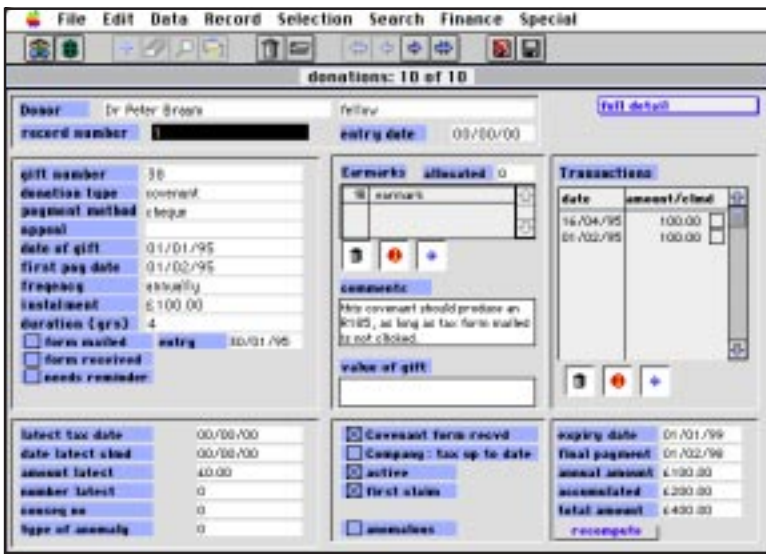
A variety of views gives you flexible access to your information

Apply cutting-edge fundraising techniques to your organisation

The association of the database and the integrated word-processor allows you to perform personalised mailings. Through a simple mouse-click automatically write letters or faxes to an individual, a selected group of people or the whole database.

Also benefit from Fundraising Pro's support for telephone fundraising and improve your operations and results.

The simple and powerful wordprocessor allows you to perform powerful mailings and daily wordprocessing work

Automate your tax processing. Easily perform book-keeping and form processing for different kind of donations through the finance module.

This powerful standard feature will guarantee an extremely fast payback for Fundraising Pro.

The tax processing module is dubbed by powerful and easy-to-use reporting facilities

" The event management system allows you to write a 'Who's who' about your people."

Nick Perry

Graphical buttons on the tool bar provide fast and easy access to functions, pages etc

Quick search in transacti

Transaction date `>1/3/95`

Donation number

Cancel   GO

The quick search facility will allow you to find transactions entered between dates

File Edit Data Record Selection Search Finance Special

transactions: 12 of 20

trans date	gift no	postname	trans £	type	tax £	recl'd	date
03/03/95	41		£20.00		£0.00	☐	03/03/95
03/03/95	46	Dr. Anne H. Gauthie	£2,000.00	gift aid	£0.00	☐	01/04/95
10/03/95	47	Ms L. Giraffe	£300.00	gift aid	£0.00	☐	01/04/95
15/04/95	39	Dr Peter Braam	£1,000.00	gift aid	£0.00	☐	16/04/95
15/04/95	39	Dr Peter Braam	£1,000.00	gift aid	£0.00	☐	16/04/95
16/04/95	38		£100.00		£0.00	☐	16/04/95
16/04/95	39	Dr Peter Braam	£1,000.00	gift aid	£0.00	☐	16/04/95
15/04/95	53	Dr Peter Braam	£200.00	gift aid	£0.00	☐	26/04/95
15/05/95	53	Dr Peter Braam	£200.00	gift aid	£0.00	☐	26/04/95
15/05/95	64	Dr Peter Braam	£200.00	covenant	£0.00	☐	26/04/95
16/04/95	64	Dr Peter Braam	£200.00	covenant	£0.00	☐	26/04/95
20/04/95	63	Dr Peter Braam	£200.00	covenant	£0.00	☐	26/04/95

Select Views Output `transactions`   Input `entry`

Manage various sorts of donations Fundraising Pro handles any type of donation. Track each donor's donations and classify them to your convenience: financial donations, gifts, pledges, covenants, matching gifts, gift-in-kind and so on.
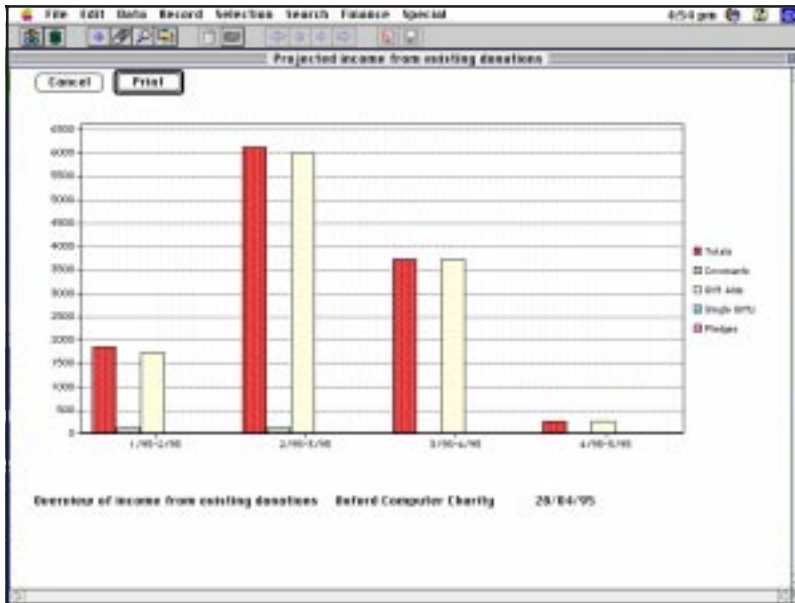
Manage those donations on a day to day basis and use the flexibility of the database to run donation reports over time and analyse your performance.

Capitalise on reporting facilities The reporting tool allows you to improve your overall operations and become even more efficient day after day. With Fundraisng Pro you can report on marketing or financial activity and then produce effective management reports and graphs.

Use the powerful graph capabilities to track the performance of your department

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Fundraising Pro Features

People Management
• Unlimited numbers of contacts, donations, codes etc.
• Immediate access to different views: summaries and complete detail
• Customisable event logging for contact history and prospect tracking
• Enter information about your contact in forms on the screen, or use sophisticated import facillites to incorporate existing data
• Integrated access to related data such as events, donations, bank details
• Company contacts, master records, married couples are easy to record and use
• Respect anonymity with anonymity check box
• 62 fullly customisable fields: dates, alphanumeric, numbers, currency, notes, pictures, tick boxes.
• Customisable popup lists for frequently used fields
• Support for Telephone Fundraising
• phONE day facilities
• When prospects phone, talk to them with all personal information you need immediately at your fingertips
• Membership management

Taxes (UK version only)
• Complete management of taxes: R185's, R190's, R68's.
• Produce complete tax returns simply by supplying the date.
• Automated verifification for numerous erroneous conditions: eg. missing payments, wrong amounts, missing forms, overpaying covenants.
• Mail forms together with personalised letters and custom labels when required.
• Retain important taxation information for audits, instantly reproduce old returns

Donation Management
• Complete schedules of payments, computation of totals
• Select payment types from customisable popup list
• Full support for covenants, gift aids, direct gifts, pledges, gifts in kind, legacies, foreign currency gifts, matching gifts and tributes
• Donation targets held in customisable earmark lists
• Credit Card information
• Entry of donations either directly from people screens, individually or through imports.
• View donations separately or included with people information sheets
• Complete control and visibility of bank transactions when required

Financial Features
• Deductive graphical projections of income
• Detailed reports on income
• Bank transactions can be entered manually
• Export to ledgers for use with "off the shelf" accounting packages

Event Logging & Tracking
• Maintains events for individuals or groups
• Prospect tracking
• Contact history maintenance
• Customisable event logging
• User definable automatic views of important events

Flagging & Coding
• Charity event management
• Waterfall contacting
• Professional networking
• Customisable attendance, response and data history recording
• Unlimited faciilities for permanent or temporary segmentation or grouping of prospects

Tasks
• Set reminders for customisable task types (phone calls, letters, faxes, meetings)
• Indicate tasks to your staff on line
• Set dates, times, deadlines and record completion for each task
• Instantaneous views of designated tasks through the control panel

Correspondence
• Internal creation, merging, tayloring of letters and other mailings through built in word processor or easy export for merges in Microsoft Word.
• Build in word processor is compatible with standard wordprocessors such as Word, Worperfect
• Automatically generated addresses, dates, salutations and closings
• Customisable mail merge templates
• Access to all fonts, styles, hotlinks and graphics for inclusion
• Headers, footers, page numbering and justification
• Output to screen, file, printer, fax or email

Reporting and Forms
• Easy to use report generator
• Report on any field in the database
• Output reports to screen, printer, fax or files
• Complete form preparation for questionaires, phonatons, requests, rsvp's

Queries and Sorting
• Fast, flexible and sophisticated searching facilities vary between quick searches, and complex relational queries.
• Mouse clicks perform relational queries from donors to gifts, transactions or events. Highlight and relate
• Reusable queries can be loaded from disk
• Search on any field or variable
• Unlimited sorting facilities

General Features
• An integrated package, no additional modules needed.
• High security levels through passwords and privileges
• Guards against duplicates and accidental deletions
• Single menu throughout the application for continuity and ease of use
• Complete Windows and Macintosh look and feel: it's supposed to be fun
• Sophisticated import and export
• Toolbar for versatile navigation and ease of use
• Increased productivity through keyboard shortcuts

System Requirements
• Single- and multi-user versions available
• Runs on Pentium PC's with Windows 95 & NT 4.0 or Macintosh 68040 models or later.
• Minimum RAM 16MB, disk 300MB

Support
• Online help
• Fully detailed manuals for different levels of detail
• Email support group to exchange ideas and solutions, and communicate with customer support.