



Alumni/Development Software Features

The Alumni/Development module provides constituent management including campaign, appeal, and prospect maintenance. Robust reporting with comparisons to previous and consecutive years and pledge and gift processing (payments, stock, in-kind) for multiple campaigns and appeals are also included in the Alumni/Development module.

Our Alumni/Development software is designed to allow independent schools to efficiently manage constituents and increase fundraising. Couples are linked together into households, with each individual having their own record. This allows couples to be viewed together on the same screen, but still allows each individual to have attributes, relationships, giving information, constituencies, and biographical information specific to that individual.

Alumni/Development uses a hierarchy to define the destination of each gift, pledge, or pledge payment. The top level of this hierarchy is the campaign, or overall purpose to which the gift will be applied. Under each campaign any number of funds can be defined to designate more specific uses for the gift. Each gift is given to a particular fund during a certain fiscal year, so the same fund can be used across multiple fiscal years.

Full integration with General Ledger allows for real-time updates and easy corrections of transactions. Alumni/Development also features many common reports including alumni class reporting, appeal status and participation, and annual comparison reports. The Alumni/Development software also allows you to easily produce receipt acknowledgements and thank you letters for gifts received, including the ability to mail to individual constituents or constituent and spouse together.

General Features

- Unlimited number of constituents (individuals and organizations) (*see Image 1 below*)
- Unlimited number of constituency types per constituent
- Unlimited number of attributes per constituent
- Multiple addresses per constituent (home and work) (*see Image 2 below*)
- Unlimited number of relationships (*see Image 3 below*)
- Multiple user-defined salutations
- Tracking of higher education and degrees
- Tracking of student clubs, activities and awards
- Contact tracking with reminders and follow-up reporting
- User-definable formal and informal salutations
- User-definable appeals tracking
- Unlimited free form comments
- User-definable campaigns and fund designations
- User-definable giving levels (i.e. giving clubs, giving circles)
- Quick lookup of constituent's giving history in detail as well as summary formats (*see Image 4 below*)
- Ability to attach any type of document to each constituent's record (i.e. newspaper articles, images, movie clips, word processing document, spreadsheet etc.)

(Mr. and Mrs. John M. Baker) - aj / ic

Solicitor | Appeal | Giv. Summary | Giv. Detail | Track | Custom | Comments

Name | Salutations | Address | Info | Attributes | Relation | Activity | Education

Constituent

Title: Mr. I.D.: 0000005

First: John Pref: John

Middle: M.

Last: Baker Suffix:

Maiden: Sex: M

Constituency	Pri	From	To	
Parent	<input checked="" type="checkbox"/>			<input type="button" value="Add"/> <input type="button" value="Delete"/>

Class Yr: Yr Left: Grad: 1

School:

Giving Level: Founder's Circle

Spouse

Title: Mrs. I.D.: 0000004

First: Ellen Pref: Ellen

Middle: B.

Last: Baker Suffix:

Maiden: Thomas Sex: F

Constituency	Pri	From	To	
Parent	<input checked="" type="checkbox"/>			<input type="button" value="Add"/> <input type="button" value="Delete"/>

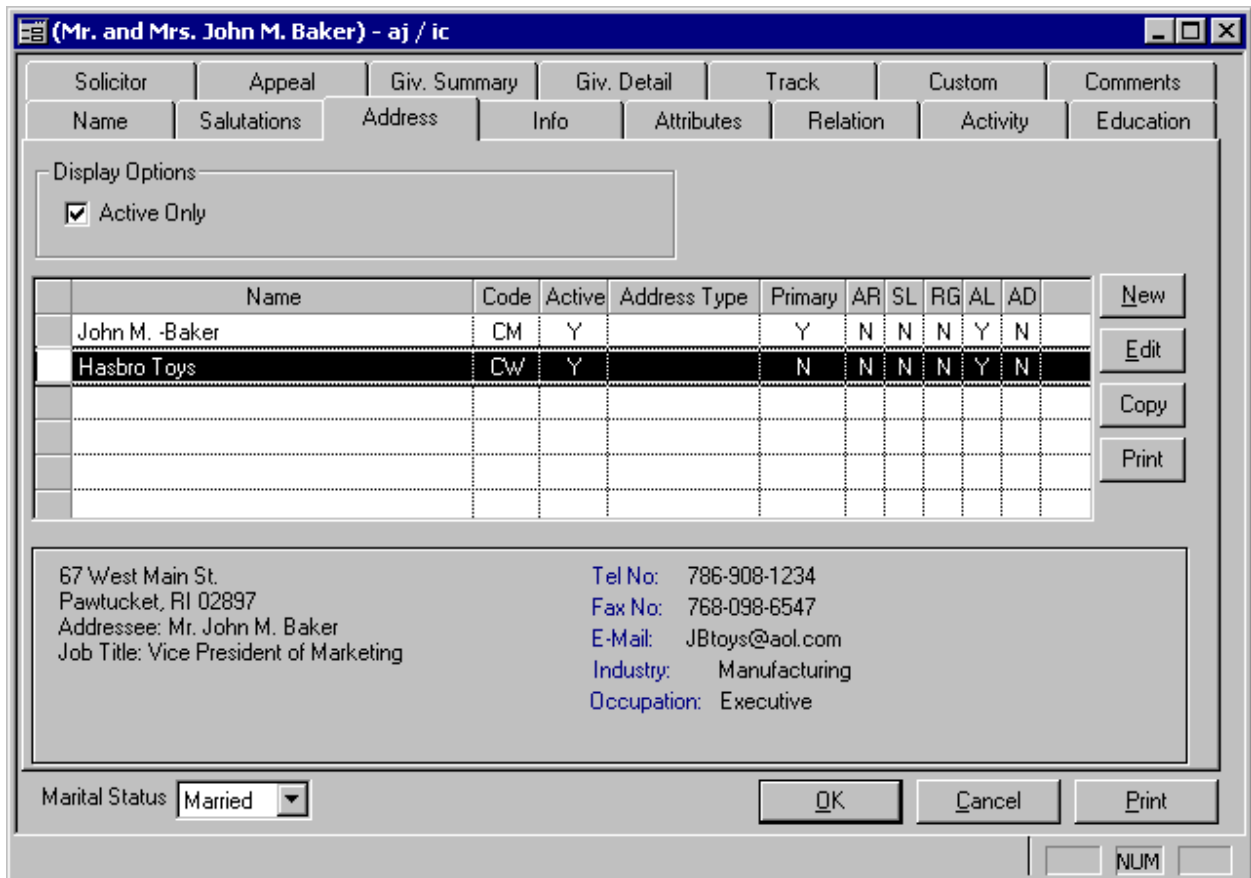
Class Yr: Yr Left: Grad: 1

School:

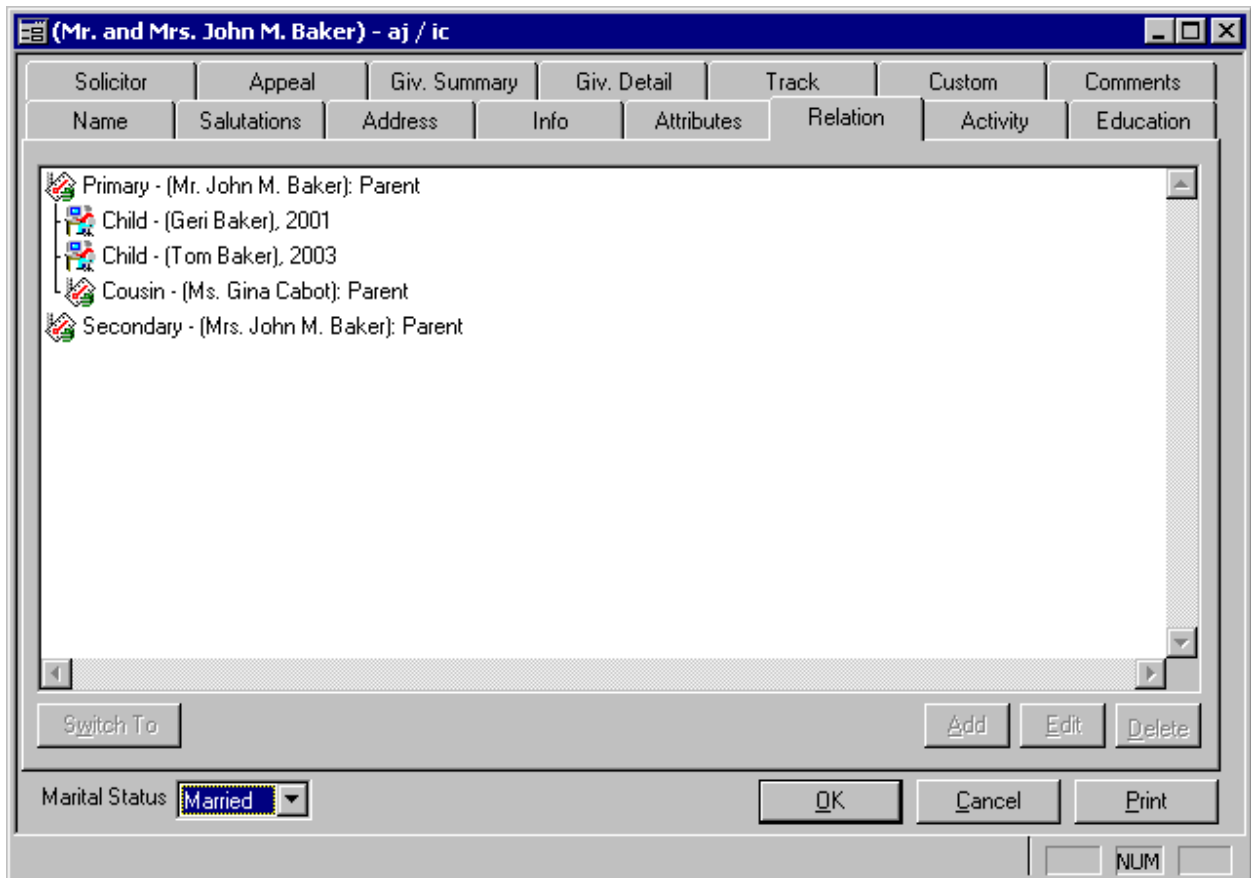
Giving Level: Founder's Circle

Marital Status: Married

Alumni Constituents Maintenance Screenshot – Image 1



Alumni Constituent Address Screenshot – Image 2



Alumni Constituent Relationships Screenshot – Image 3

(Mr. and Mrs. John M. Baker) - aj / ic

Name	Salutations	Address	Info	Attributes	Relation	Activity	Education
Solicitor	Appeal	Giv. Summary	Giv. Detail	Track	Custom	Comments	

Giving Statistics

	Year To Date	Count #	Lifetime		Amount	Date
Pledges	2,700.00	2	2,700.00	Largest Pledge	1,500.00	11-15-1999
				Last Pledge	1,200.00	11-23-1999
Gifts/Pymts	21,160.00	7	21,160.00	Largest Gift/Pymt	13,000.00	11-23-1999
				Last Gift/Pymt	2,000.00	11-23-1999
Gifts/Pymts with SC	27,710.00	11	27,710.00	Largest Gift/Pymt with SC	1,000.00	01-03-2000
				Last Gift/Pymt with SC	1,000.00	01-03-2000

Giving Summary

Campaign	99-00	98-99	97-98	96-97	95-96	94+
Annual	4,500.00	0.00	0.00	0.00	0.00	0.00
Capital	18,260.00	0.00	0.00	0.00	0.00	0.00

Display: **Constituent** Type: **Gifts + Pledges** Campaign Fund **Giving Levels**

Marital Status: **Married**

Alumni Constituent Giving Summary Screenshot – Image 4

Gift/Pledge Posting Features

- One consistent method for easy entry of gifts, pledges and payments (*see Image 5 below*)
- Specific coding of Stock and Inkind gifts
- Automatic reminder of existing pledges when entering new gifts
- Automatic soft credit to spouse record
- Easy election of one or multiple funds per gift
- Unlimited matching pledge companies per gift or pledge
- Variable match ratio with the ability to override match amount
- Unlimited soft credits per gift
- Unlimited honor/memorial entries per transaction
- Easy selection of acknowledgement and thank you letters
- Easy selection of constituency and appeal for each transaction
- Automatic calculation of giving levels when entries are posted
- Automatic matching pledge credits for constituent and matching company
- Allows for multiple open accounting periods
- Detailed posting registers for all updates
- Automatic Due To/Due From posting into the General Ledger
- Entries are grouped together for easy reconciliation
- Easy correction of any transaction with automatic update of General Ledger module
- Easy entry of write-offs when necessary (*see Image 6 below*)
- Real-time, fully integrated General Ledger posting
- Fund level designation of debit and credit accounts for each type of transaction

Pledge Posting - (Mrs. John M. Baker)

Pledge | Payment Schedule | Fund Distribution | Honor / Memorial | Matching | Soft Credits | Comments | Giv. Summary

Pledge
 Date: 01-04-2001 | 2000 | November
 Amount: 1,000.00 | 1st Install.: 250.00
 Fund: FUND 1 (Building Fund)

Acknowledgement
 Receipt Type: payment
 Receipt Amt.: 250.00
 Receipt Date:
 Note:

Payment
 Type: Check
 Ref. No.: 45699 | Date:
 Exp. Date: | Bank No:
 Use as default payment information

Letters
 Letter 1:
 Letter 2:
 Print Date 1: | Date 2:
 Note:

Attributes
 Appeal: Holiday Fun Drive (2000) | Solicitor I.D.:
 Cons: Parent | Attribute:
 Anonymous Gift

Include in giving levels

OK | Cancel | Delete

NUM

Alumni Gift Posting Screenshot – Image 5

Writeoff Posting - (Mr. John M. Baker)

Pledge		Date	Amount	Balance	
Pledge Date	11-23-1999	✓ 12-06-1999	400.00	0.00	▲
Last Pymt Date	01-28-1999	✓ 12-20-1999	400.00	0.00	■
Pledge Amount	\$1,200.00	01-03-2000	400.00	0.00	▼
Amount Rec'd	\$800.00				▼
Balance	\$400.00				▼
Pending Pymts	\$0.00		1,200.00	0.00	▼

Date	Comments	Amt	
→ 01-04-2001		400.00	▲
			■
			▼
		400.00	▼

Include in giving levels

OK Cancel

NUM

Alumni Gift Writeoff Screenshot – Image 6

Reporting Features

- Over 50 standard reports
- User-definable query system allows for the easy selecting and sorting of records
- Easy export of all report data
- User-definable constituent name selection on most reports
- Constituent lists
- Alumni/Alumnae lists and Class Summary reports
- Pledge specific reports
- Detailed giving reports in many different formats
- Giving summary reports
- Appeal status and participation
- Annual comparison reports
- Pledge projection and status reports
- Transaction history reports
- Fund summary and detail reporting
- Alumni class summary reporting
- Export reports to text or PDF format
- Email or post reports on the Internet or an intranet
- Custom report writer (Crystal Reports) for building your own reports

Mailing and Export Features

- Designed to work seamlessly with all industry standard word processing programs
- Easily produce receipt acknowledgements and thank you letters
- A single screen combines the merge and label printing into one simple task
- Pledge reminders and pledge statement forms
- User-definable query system allows for the easy selecting and sorting of records
- Mail to individual constituents or constituent and spouse together
- Targeted appeals mailing and results function
- Support for seasonal addresses
- Additional forms directly supported include standard envelopes, postcards and index cards