

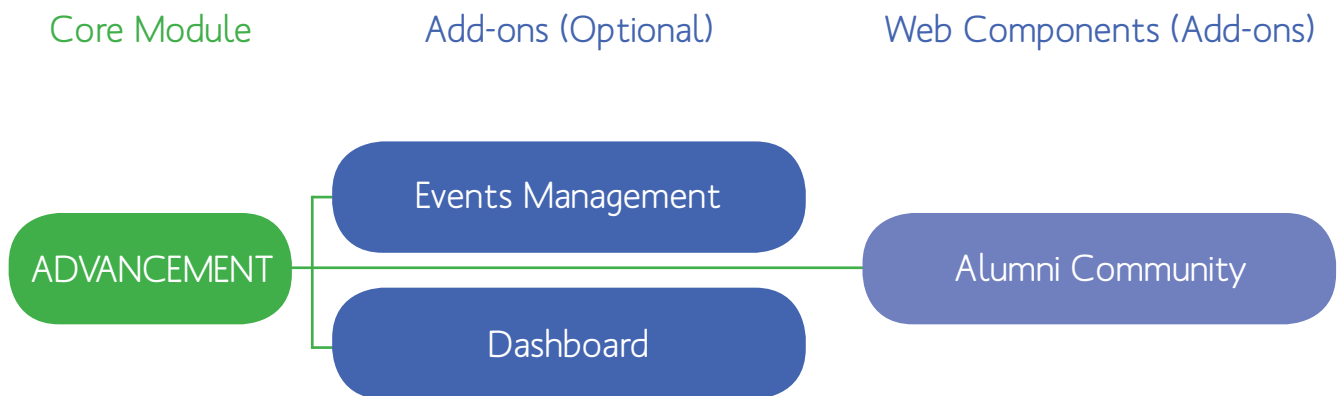
ADVANCEMENT CORE MODULE

AT THE
CENTER
OF IT ALL

One School Solution At The Center Of It All...

Senior Systems is at the center of everything. Our single, central database empowers independent schools to manage data effectively and efficiently. In addition, our database allows us to build long-lasting third-party relationships to expand products and services with seamless integration options.

Advancement Product Map



Drive fundraising and manage constituents for your alumni office with Advancement.

The Advancement team needs dynamic and accurate information about constituents, ranging from basic biographical to detailed giving history, relationships, and customized greetings. That's a start, but it's not enough: you also need sophisticated features like prospect management, appeals and solicitation tracking, and a full set of robust and functional mailing and relationship management tools. The system needs to record and track every detail about gifts, pledges, and payments. We know you require extensive reporting and data export capabilities too, like the flexibility to analyze data by constituent or by household. Finally, you need a system without bottlenecks: it has to be completely integrated with your student information system and your accounting software.

Advancement Features

- Define and track an unlimited number of funds, campaigns and appeals
- Maintain and access deep constituent data: biographical details, addresses, customized greetings and giving history, solicitors, appeals, relationships, and more
- Collate and segment records: constituents and spouses are recorded as a household, but discrete records for each individual are kept for flexible reporting and analysis
- Efficiently record and process gifts, pledges and payments, including thank-you letters and receipts
- Sophisticated tools for prospect management
- Mailing functions that include the ability to use National Change of Address processing for verification and standardization of mailing addresses, resulting in mailing savings
- Extensive report and export tools, including re-usable and optionally shared report templates, easy management of operational reports, and integration with Crystal Reports for customized reports that fit your unique needs
- Deep integration with the Registrar module facilitates creation of constituent records directly from student and parent data

Events Management | Advancement Add-on

Fundraising and other constituent events such as banquets, golf tournaments, and auctions are an important part of your Advancement Office efforts. Your events management software needs to help you plan and organize, budget and track revenues and expenses, mail invitations, manage task and volunteer assignments, and print name tags and place cards. And of course, you want your events management system to integrate closely with your constituent management system, accounting software, and student information system.

Features

- Handles a wide variety of events including sports tournaments, banquets, and auctions
- Events can be simple, single-day occurrences or can encompass multiple activities over a series of days
- Establish budgets, price structures, floor plans, and seating charts
- Manage important tasks and volunteer/staff assignments
- Mail invitations, create name tags and place cards
- Track expenses and revenues by activity or by event
- Upload digital photos for future use in publications, etc.
- Import from or export to your auction tracking software
- Integrates with Alumni/Development to access constituent data and to create new constituents from event attendees
- Integrates with General Ledger to post event revenues
- Integrates with Registrar to access faculty, student, and parent data to invite guests and gather volunteers

TRAINING OPTIONS

Get the greatest productivity out of your tailored solution with training on your own data, wherever and whenever you need it:

At your school. We'll be right there with you after installation, walking you through best practices with minimal disruption to your schedule.

Online. Maximum flexibility and spot-training for new hires.

In our offices. Dedicated training without distractions in our state-of-the-art training center. Get immediate answers from the experts!