



YOUR DONATIONS AND YOUR FUNDRAISING CAMPAIGNS... A HEADACHE?

CHARACTERISTICS AND STRUCTURE OF THE DATA BASE

Client management

- donors, volunteers, members, enterprises...
- customizable sectors of activity, categories, characteristics and fields
- creation of links between contact files (parent/child, employer/employee...)
- folder to classify every linked document (letters, emails, charts...)
- possibility to insert the contact's photo
- fast and easy to use search functions and filters
- easy execution of extractions and assignments to customized lists
- production of cumulative statistics (lifetime donations, average donation, promises...) and of groupings by period, type, region...

Donation occasions and activities management

- a donation occasion (e.g.: dinner-show) may contain many activities (e.g.: supper tickets, sponsorships, donations...)
- revenues and expenditures by accounting item
- list of participants to events

Master document management

- multilingual mailing
- merge fields integrated with MS Word (labels, letters, envelopes...)
- mailing history

Transaction management

- transaction entry, deposit slip, accounting entry summary
- complete or partial payment processing
- documents to issue
 - customized acknowledgements
 - tax receipts (unique or annual)

Task management and history; integrated Customer Relationship Management (CRM)

- planning of tasks and follow-up actions (day planner)
- centralization of the actions done by the personnel (lifetime history)
- customizable types of tasks (to contact, potential sponsor, meeting, follow-up...)

ADDITIONAL BENEFITS

- ✓ Analysis tools and history (researches about all transactions, groupings, crossover studies, filters...)
- ✓ Export towards MS-Excel to create graphics
- ✓ Many integrated reports (donation occasion results, list of donors by activity, summaries by occasion...)
- ✓ Design of customized reports (printer, screen, PDF, Excel)

Annual service contract (ASC) free the first year: technical support, updates, influence on development

MODULES THAT MAY BE ADDED TO PRODON'S LICENSE

Network: security and access management per user

Invoicing: partial or complete payments, tax free items sale

Electronic transactions: credit cards and direct debits

Prospecting and commitments: planned gifts, major fundraising campaigns...

Online donation: customized forms, individual or corporate donations

E-mail Blast and "Sign up Online"

Section: mass mailings of personalized e-mails

Beneficiaries: loans and grants, life annuities...

Data importation: 3 modules: client, transactions and commitments

Accounting integration: compatible with most accounting software products

Multi-organization: organization holding more than one charitable registration number

ALSO AVAILABLE:

SolliPro License: canvassing of ex-patients (hospitals, health and social service centres (CSSS)...)

SolliTel License: telemarketing

Transfer service of initial data to ProDon

Group demonstrations in various cities
www.logilys.com/demoprodon

