convio®

Convio® Common Ground™ CRM System for Nonprofits

The Convio Common Ground CRM system was designed to help nonprofit professionals like you build stronger relationships with your supporters — all of your supporters, not just donors. It reaches further than traditional donor databases, making it possible for you to pull together constituent information from multiple tools, across all of your organization's departments.

Common Ground is built on one of the leading CRM systems in the world — the open technology platform Force.com® from salesforce.com®. This allows Convio to leverage the services and functionality of a comprehensive, proven and continually improving CRM foundation, and build a customizable, flexible system that's tailor-made for nonprofits.

Because Common Ground is built on the on-demand Software as a Service (SaaS) model, you can access it from anywhere, any time, via the Internet. There's no software to install or maintain, and no expensive hardware to purchase. It's easy-to-use and affordable, yet gives you powerful tools to help you manage and track donors and other supporters.

The bottom line: You can now manage all of your data in one place and get a complete view of your constituents and their activities with your organization — without the limitations and hassles of your traditional donor database or multiple spreadsheets.

Benefits

Focus on your mission, not on technology
With Common Ground, there's no hardware to purchase and maintain, no software to upgrade, no expensive training to attend and no limit to the amount of data you can store.

Effectively manage all data, not just donors
No longer will your departments need to maintain silos of data, create dozens of spreadsheets, and build custom databases for project-focused purposes. Common Ground allows you to realize the power of constituent relationship management.

Make it your own — go ahead, customize it
Easily add new fields, change page layouts, restrict views and data access using permissions, create custom workflows to alert staff of various activities, and even design entirely new modules to serve your specific needs.

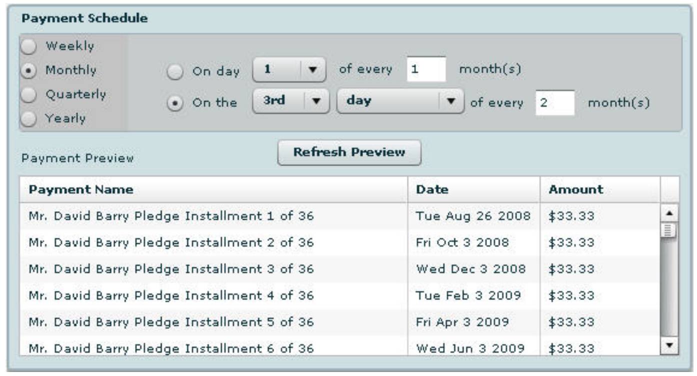
Innovation
Convio + salesforce.com = unmatched innovation for nonprofits. By partnering with salesforce.com, Convio can focus on building features designed specifically for nonprofits while offering the strength and ongoing investment already being applied to the Salesforce CRM product.

Always available, from any web device
If you've got the Internet, you've got Common Ground. Access your data from anywhere, anytime, from any web-enabled device — that means the cyber café around the corner, your new mobile phone, and virtually any Internet browser from any type of computer.

Features

Donation Management

Track all gifts, build revenue forecasts, find prospective donors, and monitor major donor opportunities from one application.



Payment schedule for a pledged gift

- **Single Gift** – Quickly track gift transactions with payment and reference information.
- **Recurring Gifts** – Track a recurring series of payments on a donor-specific schedule.
- **Pledge Gifts** – Manage committed donations with multiple installments, and forecast gift income for future periods.
- **Planned Gifts** – Monitor your multi-stage planned giving opportunities and commitments for individual donors.
- **Major Gifts** – Identify and track major gift opportunities, and then forecast anticipated income and manage all interactions to coordinate team efforts.
- **Batch Gift Entry** – Select data entry fields and determine validation rules, and then create a batch of gift records based on a deposit report.
- **Matching Gift Tracking** – Manage a listing of organizational or individual matching gift commitments, and then track all received gifts to fulfillment.
- **Gift Designations** – Split individual donations by program or fund code for accounting and reporting purposes.
- **Summary Giving Totals** – Automatically calculate cumulative giving summaries for individual, household and organization records.
- **Soft-credits** – Automatically create donation transactions for household members or other contacts based on relationship rules or gift instructions.
- **Revenue Forecasting** – Predict future income based on committed gifts and gift opportunities.
- Memorial/In Honor Gifts – Track memorial/honor gift notifications, personal messages and donor preferences.
- **Personal Fundraising**– Create personal fundraising campaigns and track multiple individual donations and supporter relationships.

Constituent Relationship Management

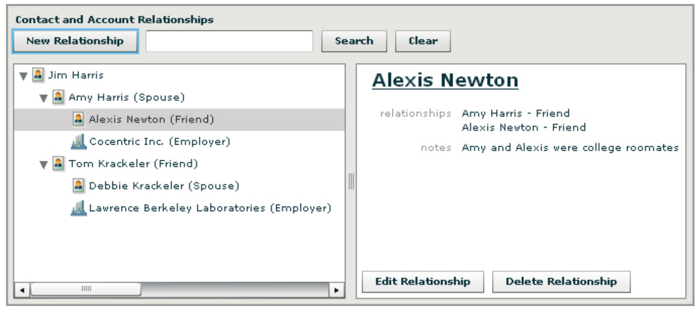
Store all contact and interaction data in one place. Link contacts to households and organizations and define relationship types to create a complete profile of all of your contacts and supporters. Track all interactions — whether 1:1 or from targeted bulk campaign outreach.

- **Correspondence Tracking** – Link all communications — whether one-to-one emails, phone calls, bulk email campaigns, or direct mailings — to each individual record for tracking and segmentation.
- **Classification Types** – Assign constituents one or many classification types (e.g. Volunteer, Major Donor, Board Member) for segmentation and reporting.
- **Microsoft® Outlook® Integration** – Intellisync® plug-in to integrate Outlook data and enable email tracking.
- **Lotus Notes® Integration** – Intellisync plug-in to integrate Lotus Notes data and enable email tracking.
- **Quick and Advanced Search** – Easily search a subset or the entire database using partial text and wildcard characters.
- **Householding** – Link two or more constituents together as a "household" to share mailing addresses and compile household donation summaries.
- **Notes and Attachments** – Log multiple notes or attach documents to individual contacts.

- **Multiple Address Tracking** – Store seasonal or alternate addresses and keep track of all address changes for rollback or deduplication.
- **Tasks and Events** – Manage follow-up tasks and create calendar events for each individual or for specific constituent interactions.

Relationship Management

Build relationships between individuals, organizations, or both using graphical relationship management tools that simplify tracking and help staff with constituent management.



Contact and account relationship tracking

- **Relationship Tracking** – Define and track the reciprocal relationships between individuals, organizations, or both, and log known dates and notes.
- **Custom Relationship Types** – Customize the types of relationships available to associate with individuals or organizations.
- **Relationship Search** – Query an individual contact for known relationships, or search the entire database for contacts with a specific type of relationship.
- **Automatic Relationship Assignment** – Create relationship links between gift donors and honorees, TeamRaiser™ event participants, and other records based on custom workflow rules when using Convio's online marketing products.

Convio Online Marketing Integration

Common Ground includes automated synchronization with Convio's online marketing products to capture all online record changes, gifts, and major interactions.

- **Contact Synchronization** – All contacts with an email address are automatically synchronized between applications on a scheduled or on-demand basis.
- **Gift Transactions** – Donations processed by Convio are automatically associated with the contact record and added to Common Ground during the scheduled synchronization.
- **Recurring Donations** – When a donor schedules a recurring gift series (no set amount with no pre-determined end date) a corresponding record is captured in Common Ground to track the schedule, and all subsequent related transactions are linked to this recurring gift record automatically.
- **Pledge Gifts** – When a donor schedules a pledge gift (a set amount with a fixed installment schedule) a corresponding record and forecast payment schedule is captured in Common Ground to track the installments, and all subsequent payments are associated with the appropriate installment record.
- **Personal Fundraising Gifts** – Common Ground associates every gift made as a Convio Personal Fundraising (formerly known as Tributes) with the original champion record and automatically creates relationships between Personal Fundraising champions and donors.
- **Campaign Cross-Referencing** – Link your online forms and campaigns to your Common Ground campaigns to track individual contact participation across your various online marketing efforts.
- **eCommerce Purchases** – Every Convio Ecommerce store purchase is cross-referenced with a campaign in Common Ground to group all transactions for easy reporting. Additionally, individual store items can be tracked to specified Common Ground gift designations for proper accounting.
- **Event Ticket Purchases** – Each Convio Event is cross-referenced with a campaign in Common Ground to track all registration fees collected. Additionally, Common Ground gift designations can be associated with ticket purchases and additional gifts for proper accounting.
- **TeamRaiser Registrations** – Common Ground tracks Convio TeamRaiser registrations and gifts, and automatically links all donations made on behalf of participants with the initial TeamRaiser entry. Common Ground also automatically creates a relationship between participants and supporting donors.
- **Advocacy Participations** – Track each action alert participation to a Common Ground campaign and automatically populate each contact's campaign status (e.g. Sent letter, Called decision maker) based on individual constituent actions.

- **Bulk Email Messages** – All Convio Email Marketing campaigns can be cross-referenced to Common Ground campaigns to record the message delivered for each contact, allowing your organization to track every correspondence delivered, whether in bulk or one-to-one.
- **Gift Designations** – Associate online forms with Common Ground designations or establish cross-reference links between individual online gift designations to provide more detailed tracking of every dollar received.
- **Segmentation Sharing** – Segment contacts in Common Ground based on their cumulative interaction history and profile records, and then link your Common Ground segments to online groups in Convio for email delivery and conditional web content.
- **Duplicate Management** – Potential duplicate records are arrested in Convio before they are added to Common Ground by comparing the data in both applications and providing a simple interface for staff to merge records. Once resolved, profile records are synchronized and associated interactions and gifts are populated in Common Ground.
- **Cancelled or Declined Charges** – Online recurring gifts and payment installments are updated automatically in Common Ground whenever a credit card is declined or a charge cancelled online.

Campaign Management

Associate individual contacts with campaigns, perform bulk add and update operations, and monitor budget vs. income goals to track every interaction with your contacts and improve segmentation for future outreach.

- **Associate Contacts** – Track all constituent targets and participants to each campaign individually or in bulk, allowing your staff to monitor every "touch" your organization has with each individual.
- **Multi-level Campaigns** – Group multiple campaign efforts to compile reporting statistics and organize your multi-channel efforts.
- **Custom Status Tracking** – Create a unique list of potential campaign participation options (e.g. invited, attended, donated) for each campaign.
- **Campaign Attachments** – Attach files, such as invitation examples, to campaigns for staff reference.
- **Budget Tracking** – Capture the budgeted and actual cost for each campaign to compare against income for reporting.
- **Bulk Add Contacts** – Add existing contacts via query, or import a .csv file of new contacts, to a campaign.
- **Bulk Update Status** – Change the status of all contacts associated with a campaign in bulk (e.g. from "registered" to "attended").

Custom Reporting and Dashboards

Start from scratch or clone an existing report and make it your own. Define summary counts, record groupings, simple or advanced filters, and time-period criteria, and share with other team members or keep private. Build multiple graphic dashboards for display on your start page and receive HTML versions via email automatically.

Custom graphic dashboards

- **Report Wizard** – Use a step-by-step wizard to determine grouping, summary, field columns, criteria, and graph options for any report.
- **Clone and Edit Reports** – Start from scratch or clone and edit an existing report.
- **Report Charts and Graphs** – Pick your graph style, colors, breakpoints and advanced options to create a visual graph for each report.
- **Report Filters** – Filter results by any database field or time parameter, and use advanced operators to return specific results.
- **KPI Dashboards** – Build key performance indicator dashboards that can appear on staff home pages and be delivered via HTML email on a scheduled basis.

- **Report Folders and Tags** – Organize reports into logical folders, or "tag" a report with keywords to help retrieve for future needs.
- **Custom Report Formulas** – Use custom formulas to calculate results based on returned values in each report to display.
- **Conditional Highlighting** – Use color coding to highlight specific values in report results based on specific conditional rules.
- **Export Report Details** – Export report results as .xls or .csv files for external analysis.

Flexibility for Customizations

With "clicks, not code" your team can easily create custom fields, control page layouts, and apply workflow rules and email notifications to customize Common Ground to meet your needs.

- **Custom Fields** – Create custom fields for virtually any object in the database (e.g. Accounts, Contacts, Donations), and select the field type, multi-select value options, validation rules, and help text.
- **Custom Page Layouts** – Create and customize multiple page display, search, and data-entry layouts based on the staff user roles of your organization and specific needs.
- **Custom Workflows** – Auto-assign follow-up tasks or trigger email notifications to staff based on field changes in the database.
- **Custom Email Notifications** – Create multiple email templates to notify staff or external individuals of changes in the database (e.g. major gift received).
- **Roles and Privileges** – Define multiple staff user roles that can be used to determine access permissions, page layouts, and workflow notifications.
- **Custom Calculations** – Combine two or more fields to calculate a new field value based on a pre-defined formula.
- **Custom Objects** – Develop completely new database tables and data relationships with page layouts and custom fields to meet your needs.

Data Integration

Import data to virtually every aspect of the database, and take advantage of several pre-built plug-ins and integration tools to help develop more complex connections with your other applications.

- **Microsoft Outlook Integration** – This plug-in utility lets your staff use Common Ground or Microsoft Outlook to manage information such as tasks, email, and contacts without sacrificing data consistency.
- **Lotus Notes Integration** – This plug-in utility lets your staff use Common Ground or Microsoft Outlook to manage information (e.g. tasks, calendar, email and contacts) without sacrificing data consistency.
- **Google® Apps Integration** – Integrate email, documents, presentations, and spreadsheets automatically when using Google apps.
- **Microsoft Office Integration** – Create mail merge letter templates and import data to excel spreadsheets for analysis or editing.
- **Data Import Wizard** – Follow a step-by-step guide to add or update contact and account records.
- **Bulk Data Loader** – The Data Loader application allows for the bulk import or export of data. Use it to insert, update, delete, or extract records.
- **Scheduled Bulk Export** – Automatically export a snapshot of all data on a scheduled basis.
- **Enterprise Web Services API** – Integrate Common Ground with other applications using this robust WSDL that exposes every data object and field in the database.
- **AppExchange® Marketplace** – Browse, click and integrate more than 800 applications that have been built to integrate with the Force.com platform.

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