

# ***Integrated Data Management Software for Corporate Foundations & Giving Programs***

*Corporate giving programs and foundations have unique ways of contributing to their communities. Corporate Pearl provides an integrated data management tool for grants management, contact management, matching gifts, volunteer tracking, and events. Written in Microsoft® Access, this concise product can be tailored to meet your needs today and can change and grow as your priorities change.*



## ***Never Type the Same Thing Twice***

**All Bromelkamp Company products are designed for easy and efficient use:**

- › Improve record keeping and data management
- › Automate office operations and improve efficiency
- › Achieve better knowledge management with flexible and comprehensive reporting
- › Customize the design to match your operations, including reports and letters to match your process
- › Navigate easily to desired functions and data
- › Change or expand as your foundation grows
- › See only what you need to see with our concise design
- › Transfer data into familiar Microsoft® products like Word, Excel or Outlook for mail merge activities and ad hoc data analysis

## ***We Are More than Just Software***

**When you purchase Pearl products, you'll notice the difference. As our client you will experience the following:**

- › Superior Technical Support
- › Free Software Updates Forever
- › Periodic User Newsletters
- › No Annual License Fees
- › On-site Training
- › Continuous Innovation



***Beyond Software***

***www.bromelkamp.com › 1.888.290.9087***

# Integrated Data Management Software for Corporate Foundations & Giving Programs

## Contacts Tracking / CRM

- › Manage all contact information in a single location; changes here update everything
  - › Compose letters and emails with just one click
  - › Chronicle all communications and related documents, including reminders
  - › Group contacts with multi-level coding
  - › View all applications and other contacts for a single organization
  - › Move easily between contacts in one organization
- › Integrate with Outlook and your PDA using our optional Outlook Synchronizer companion product

## Comprehensive Grants Management

- › Enter all data on a single screen entry
- › Relate all involved parties
- › Automate entire grant process: manage timelines, correspondence and review process
- › Schedule and track reports and payments easily and with flexibility
- › View complete applicant history
- › Integrate fully with Pearl Fund Accounting
- › Chronicle all grant communications and documents, including reminders



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# Integrated Data Management Software for Corporate Foundations & Giving Programs

## Merge Letters & Email

August 15, 2006

Gail Watson  
Program Coordinator  
Northside Community  
1687 West Broadway  
Minneapolis, MN 5542

Dear Gail,

On behalf of [Your four  
Committee has approve  
entitled **Riverway Park**  
choices, not only because  
receives.

We ask that you acknow  
for this program. Thank  
please call me.

Sincerely,

{DATE @ "MMMM d, yyyy" \* MERGEFORMAT}

{MERGEFIELD "FLContact"}  
{MERGEFIELD "ConTitle"}  
{MERGEFIELD FLName}  
{MERGEFIELD Address1}  
{MERGEFIELD Address2}  
{MERGEFIELD City}, {MERGEFIELD State}, {MERGEFIELD ZIP}

Dear {MERGEFIELD "Sal"},

On behalf of [Your foundation name], I am pleased to inform you that our Distribution  
Committee has approved a grant of {MERGEFIELD Grant W/ \$MM,HHH.00} from the {  
MERGEFIELD Program} program for your project entitled {MERGEFIELD Title}.  
Selection of grantees involves difficult choices, not only because of limited dollars, but also due  
to the careful review each request receives.

We ask that you acknowledge the Foundation's participation in any publicity or media coverage  
for this program. Thank you for your participation in this process. If I can be of any assistance,  
please call me.

Sincerely,

- › Use easy standard form letters
- › Record automatically when letter is generated
- › Customize letter appearance
- › Tailor letter content based on specific recipient data records
- › Output letters to paper, screen, email or file

## Powerful Reporting Capabilities

- › Use easy standard report formats
- › Create your own reports using report builder
- › Customize report appearance
- › Specify sorting with pop-up questions
- › Output reports to paper, screen, email or file
- › Evaluate program successes using long-term results

**Grant Awards by Program** Demo

Program	App Name	Project	Request	Grant Award	Decision Date	
CAPITAL	0006	Northstar Day Care Center	Capital Campaign to build new pro	\$20,000.00	\$20,000.00	5/15/2005
	0009	Minnesota Chapter Green Club	Build a new Music Resource	\$10,000.00	\$7,000.00	3/4/2006

**Grants Payable Report** Demo

*All Grant Payments*

App	Name	Dec	Grant	Begin	Approv	Payments	Ending Balance
							15-Aug-06
0001	Peace United	10-Jan-05	2,000	0	2,000	2,500	0
0005	West Music Academy	15-Feb-05	2,500	0	2,500	2,500	0
0003	Keep the Trees Green	25-Mar-05	4,000	0	4,000	4,000	0
0004	West End Women's Shelter	15-Apr-05	4,000	0	4,000	4,000	0
0005	District 721	15-Apr-05	25,000	0	25,000	22,500	2,500
0006	Northstar Day Care Center	15-May-05	20,000	0	20,000	20,000	0
0007	Peace United	15-May-05	15,000	0	15,000	15,000	0
0008	Northside Community Beautification	05-May-05	5,000	0	5,000	5,000	0
0009	Sioux Club/Minnesota Chapter	15-Jul-05	7,500	0	7,500	2,500	5,000
0010	Peace United	15-May-05	30,000	0	30,000	30,000	0
0012	Sioux Club/Minnesota Chapter	14-Feb-06	20,000	0	20,000	10,000	10,000
0015	West End Women's Shelter	17-Sep-05	500	0	500	0	500
0016	Peace United	04-Oct-05	7,000	0	7,000	0	7,000
0017	Peace United	17-Sep-05	2,000	0	2,000	0	2,000
0018	Keep the Trees Green	23-Jan-06	100	0	100	0	100
0019	Keep the Trees Green	23-Jan-06	125	0	125	0	125
0020	Keep the Trees Green	23-Jan-06	100	0	100	0	100

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# Integrated Data Management Software for Corporate Foundations & Giving Programs

## Manage Matching Grants

**Grants Management : Form**  
Chronicle

App: 0007 Program: Matching Status: Awarded  
Request: \$500.00 Dec: 8/1/2006 Grant: \$500.00 Title: Employee Match

Name: Peace United Ser: 3 Updated: 7/20/2006 michael

**Employee**  
Name: ABC Corporation Ser: 48 Updated: 9/28/2006 Meg  
Dept: Marketing and Community Relations AKA:  
Addr 1: 1200 147th Ave.  
Addr 2:  
City: Chicago State: IL ZIP: 60601 Country: County: Cook  
Tel: 312-578-3894 Fax: WWW: www.abccorp.com  
TaxID: 58-9876764 DExempt: Birth: ServiceArea: city/country Inst: 2  
Contact: Dougherty~Sheila Sal: Mr. Dougherty Updated: 9/28/2006 Meg  
ConTel: ConEmail: sdougherty@abccorp.com eNum: 43  
EmpID: 586947 WorkMail: MS: 1200-583  
EmpStatus: E DEmpConfirm: 7/28/2006 EmpStart: 5/1/1989 EmpEnd:  
Dgift: 7/1/2006 GiftType: C EmpAmount: \$500.00 YDEmpMatch: 1100  
EmpHours: YDEmpHours: 0

Record: 7 of 26

- › Track and manage employee charitable contributions
- › Manage contributions to a matching limit
- › Match employee volunteer hours with foundation contributions (Dollars for Doing programs)

## Manage Events

**Grants Management : Form**  
Chronicle

App: 0022 Program: Events Status: Awarded  
Request: \$3,000.00 Dec: 1/23/2006 Grant: \$3,000.00 Title: Fabulous Pheasants

Name: Keep the Trees Green Ser: 7 Updated: 4/4/2003 Bennett

**Event**  
EvtLocation: Withrom Ballroom EvtDate: 3/1/2006  
EvtHonoree: John Jacobson, III EvtAttire: Formal  
EvtNotes: table of 6 for \$3000

Double Click on Num to add a name to this Event

Resv:	Num:	Attendee:	Guest:	RSVP:	Reminder:	Attended
▶	2	38 Harrison~Ronald	Smith~Cindy	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	2	37 Singer~Jackie	Singer~Tom	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
*	2	2 Curtis~Hattie	Curtis~Pat	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Accepted: 6 Tentative: Declined: 0 Attended: 6

Record: 20 of 26

- › Track location, attire, honoree
- › Manage invited attendees



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# Integrated Data Management Software for Corporate Foundations & Giving Programs

## Track Employee Volunteers

**Volunteering Events and Hours : Form**

FY: 2005 Vol: [ ] Updated: 9/28/2006 Meg

Contact: Baxter^Julie Sal: Julie Updated: 4/12/2004 meg  
ConTitle: Executive Director Email: jbaxter@wewshelter.org Num: 9  
ConTel: 763-578-8732 mConTel: oConTel:

Name: West End Women's Shelter Updated: 9/28/2006 Meg  
Dept: AKA: Ser: 12  
Addr1: 7843 Wayzata Blvd  
Addr2:  
City: Minnetonka State: MN ZIP: 55467 Country: County: Carver  
Tel: 763-578-8732 Fax: WWW: www.wewshelter.org  
TaxID: 57-0909877 DExempt: Birth: ServiceArea: multiple counties Inst: 3  
OrgDesc:

Event: Volunteers

VolTitle: Remembrance Day  
VolDesc: Planted rosemary, flowers & forget-me-not seeds for the shelter. Clean up o  
Cost: \$358.91 Number of Vol: 2 Ovot: 2  
Value: \$1,440.00 TotalVolHrs: 8.00 OvotHrs: 10

Record: 1 of 5

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**Volunteering Events and Hours : Form**

FY: 2005 Vol: 1 Updated: 9/28/2006 Meg

Contact: Baxter^Julie Sal: Julie Updated: 4/12/2004 meg  
ConTitle: Executive Director Email: jbaxter@wewshelter.org Num: 9  
ConTel: 763-578-8732 mConTel: oConTel:

Name: West End Women's Shelter Updated: 9/28/2006 Meg  
Dept: AKA: Ser: 12  
Addr1: 7843 Wayzata Blvd  
Addr2:  
City: Minnetonka State: MN ZIP: 55467 Country: County: Carver  
Tel: 763-578-8732 Fax: WWW: www.wewshelter.org  
TaxID: 57-0909877 DExempt: Birth: ServiceArea: multiple counties Inst: 3  
OrgDesc:

Event: Volunteers

*Double click Num to add employee volunteer hours*

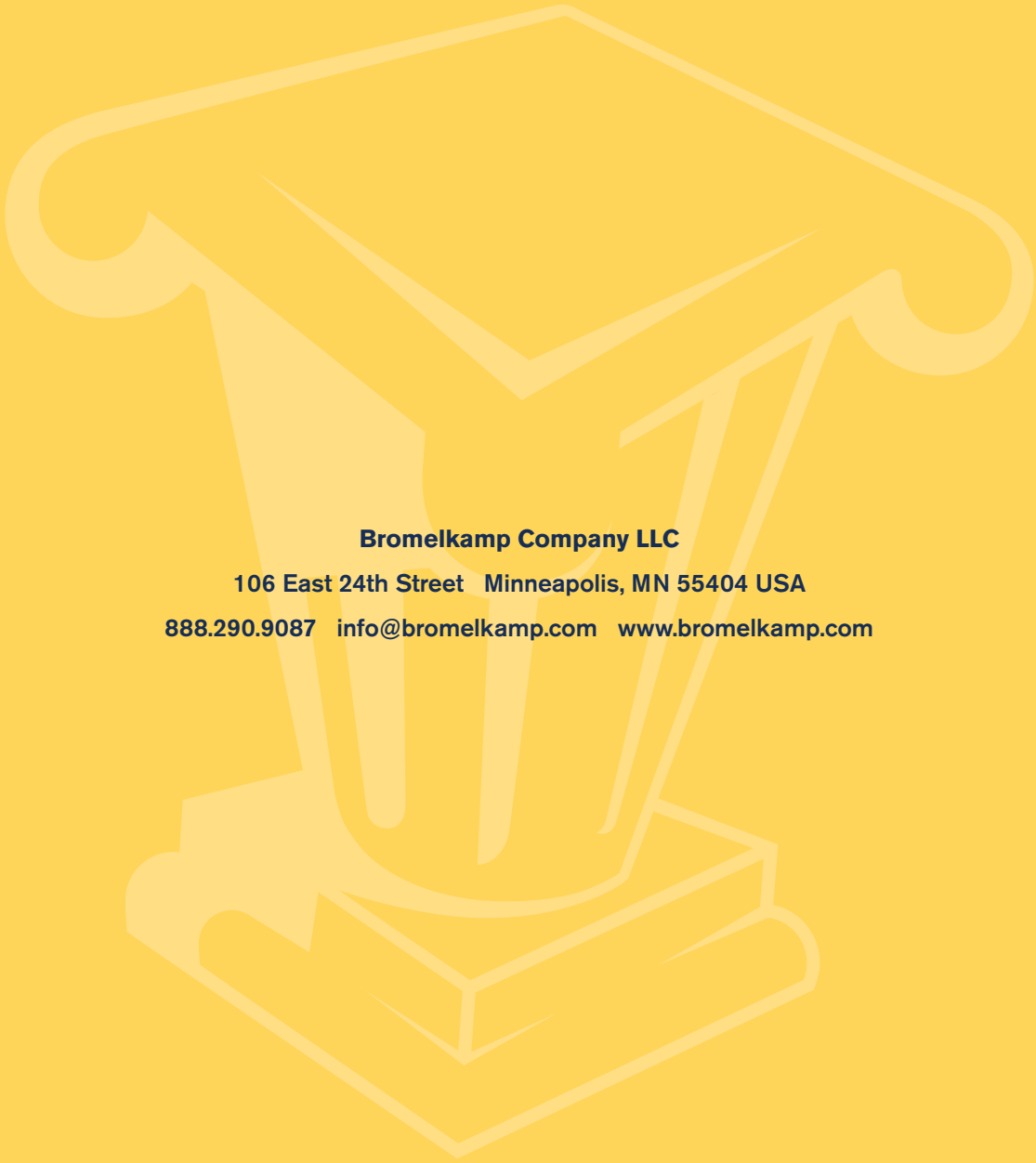
Num:	Contact:	Name:	Hours:	ConTel:	ConEmail:
▶ 43	Dougherty^Sheila	ABC Corporation	4.00	312-578-3894	sdougherty@abccorp.com
* 44	Nelson^Roger	ABC Corporation	4.00	312-578-3894	rnelson@abccorp.com

Record: 1 of 5

- ▶ Track corporate sponsored volunteer events
- ▶ Track employee volunteers and hours contributed

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**Bromelkamp Company LLC**

106 East 24th Street Minneapolis, MN 55404 USA

888.290.9087 [info@bromelkamp.com](mailto:info@bromelkamp.com) [www.bromelkamp.com](http://www.bromelkamp.com)

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