

Get More Accomplished Using Companion Products

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Bromelkamp Company LLC

- 40 years of service to grantmakers
- 200+ clients, 44 states, 3 countries
- Demonstrated expertise in philanthropy
- Designing flexible software that “works the way you do”



Slide 2



- Grants management and contacts tracking for private and family foundations



- Grants management, contacts tracking, matching gifts, volunteer tracking and events for corporate foundations



- Grants management, contacts tracking, fundraising and fund accounting for public and community foundations



- Online Grants Management, CRM



- Online grants management (matching), CRM, volunteer tracking and events for corporate giving programs



- Online grants management, contacts tracking, fundraising and fund accounting for public and community foundations

Slide 3

Getting More with Add-On Products

- GuideStar Charity Check/Canada Revenue Agency
- Authorize.net
- Bridge to Accounting Software
- Geocoding
- eGrant.net (Reviewer/Moderator/Builder)
- GuideStar for Grant Applications
- FundWeb.net
- Akoya.net Add-Ins



Slide 4

GuideStar Charity Check

\$924/yr
covers all users

*Don't ask applicants for their 501(c)(3) letter.
The IRS says you must check Publication 78.*



Pearl and Akoya.net do it automatically!

- When a new record is created
- Annually
- 30 days before a payment
- Whenever you decide to check

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GuideStar Charity Check

\$924/yr
covers all users

The screenshot shows the 'Grants Management' interface for a record titled 'Maple Tree Seedlings for Park'. The record is in 'Awarded' status. The charity is 'Greenscapes Minneapolis' with a tax ID of 39-2009264. The interface includes fields for address, contact information, and tax details. A red circle highlights a 'IRS Pub 78 Verified' icon in the 'ExemptDesc' field, indicating that the charity's 501(c)(3) status has been verified.

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GuideStar Charity Check

\$924/yr covers all users

Slide 7

Guidestar CharityCheck

\$924/yr covers all users

It saves copy of the PDF in Chronicle/Attachments

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Canada Revenue Agency

\$924/yr
covers all users

Automatically confirm the current registered status of charities

 CONSTITUENT
Teen Challenge Canada

Organization Details

CONSTITUENT DETAIL

Service Area -- Founded --

No. of Employees --

TAX EXEMPTION

Tax ID / CRA **10806663RR0001**

Guidestar Code / Charity Status **Registered**

Date Exemption Checked **1/22/2018**

Guidestar / CRA Organization Name **TEEN CHALLENGE CANADA INC.**

Description /Charity Type **Charitable organization Welfare**

GuidestarIRSBMFSubsection / Type of Revoca: **Organizations providing care other than treatment**

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Authorize.net

\$2,400
+ Authorize.net fee

Download credit card transaction information directly into a gift record from Authorize.net

Donor Gifts

Gift: 337 Chronicle Finished: Updated: 5/20/2015 SecurityMar

Donor: 177 TotalCommitment: \$100.00 Updated: 2/5/2015 Meghan

Contact: Bromelkamp*Henry Sal: Mr. Bromelkamp Updated: 1/13/2014 Karen

ContTitle: President ConEmail: Henry Num: 342

ContTel: 877-767-6701 x16 mConTel: oConTel: ConFax: DoNotMail:

Categories:

Name: Bromelkamp Company Updated: 1/13/2014 Karen

Dept: AKA: Ser: 353

Addr 1: 106 E. 24th Street

Addr 2:

City: Minneapolis State: MN ZIP: 55404 Country: County: Hennepin

Tel: 877-767-6701 ! jx: 612-767-6709 WWW: www.bromelkamp.com

TaxID: Birth: ServiceArea: world Inst: 2

Twitter: YouTube:

FaceBook:

Gift/Pledge Details Memory/Honor Notes Matching Gift

Type: GF Date: 5/20/2015 Commitment: \$100.00 Method: D Dak: Appeal: Corporations

Formal: Bromelkamp Company Campaign: Operating Endowme

| PostingDate | Amount | Fun | Account | Folio | PymtTyp | Chec | DCheck | DThanks |
|-------------|----------|-----|---------|----------|---------|------|--------|---------|
| 5/20/2015 | \$100.00 | 001 | 4015 | CR052015 | CC | | | |
| * | | | 4010 | | | | | |



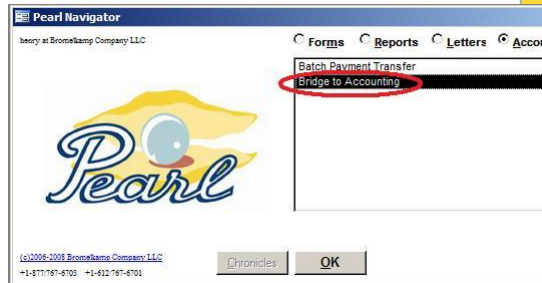
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Bridge to Accounting

\$2,800
+customization

Connect your grants database to your accounting with a bridge:

- Quickbooks
- Peachtree
- corporate accounting



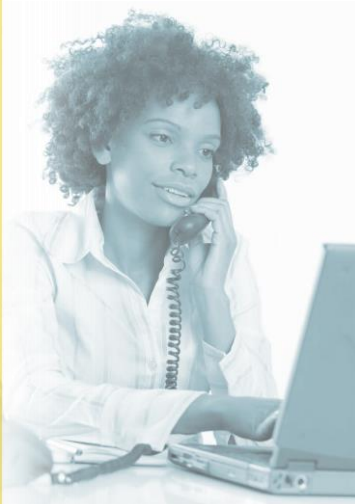
When it's time to pay someone, a file is transferred to the accounting software. Some accounting software can also return check numbers and dates to Pearl.



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Geocoding

Sets location of each Constituent record based on address:



- Latitude, Longitude
- County
- State House District
- State Senate District
- Congressional District

\$980 annually
+\$72/add'l Pearl/Akoya.net license

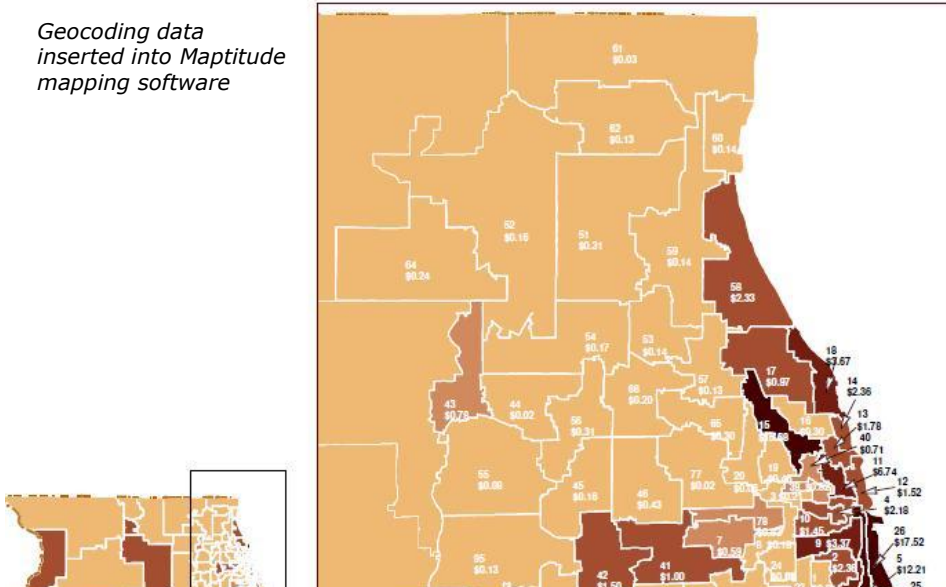


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Geocoding

Geocoding data
inserted into Maptitude
mapping software

Northeast Illinois



eGrant.net (Reviewer/Moderator & Builder)

Online grant/scholarship applications or reports

- Ensures complete information
- Accepts attachments
- Imports directly into Pearl or Akoya.net

Reviewer/Moderator

- Online committee review
- Reduces unintentional bias
- Eliminates board books

Builder

- Build and modify your own online forms

\$ 475/page eGrant.net
\$2,800 Reviewer
\$8,800 Moderator
\$2,400 Builder
+ Annual hosting fees



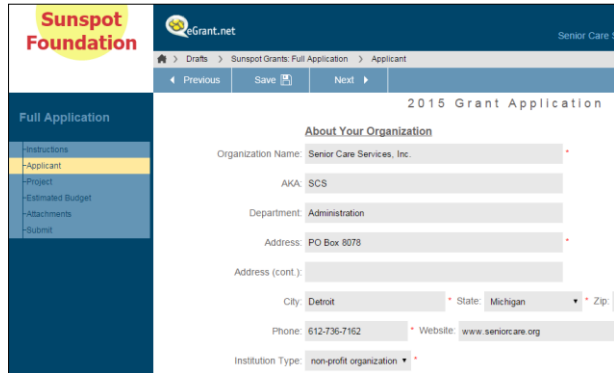
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GuideStar for Grant Applications

Integrate with eGrant.net to help applicants save time

Import core information from the GuideStar Nonprofit Profile

- EIN
- Contact Info
- Staff List
- Mission 990/ Financial Statements
- ...and more!



Contact us for pricing

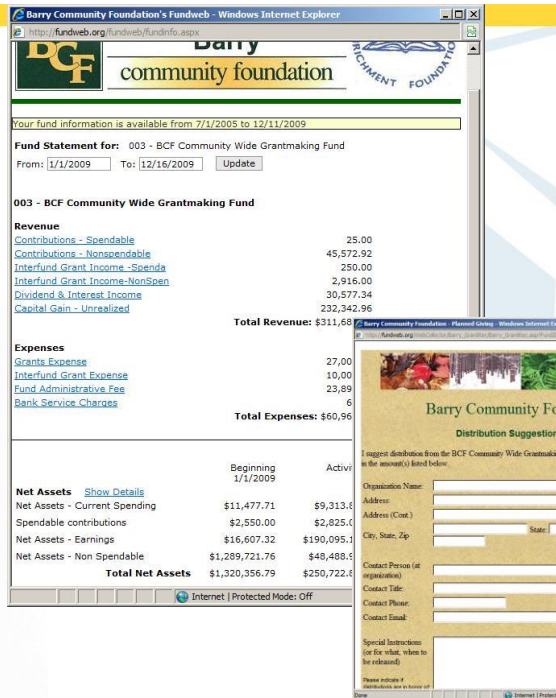
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FundWeb.net

- Fund Statement
 - Any period
 - Drill down to detail
- Donor Recommendation
- Data download



\$3,700
+ \$1,585/yr hosting



Slide 16

Akoya.net: MS Dynamics Add-Ins

- MailChimp
- Constant Contact
- Data Mapping
- DocuSign
- Adobe Sign
- Web Surveys
- Shared Calendars
- Document Mgmt

Cost Varies
(Some are free!)

AVAILABLE ON
Microsoft AppSource

Visit: <https://appsource.microsoft.com/en-us/>
(filter for Dynamics 365)

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Thank you.

Questions?

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