

Foundation Management for Community & Public Foundations



Community Akoya.net harnesses the power of Microsoft Dynamics CRM to bring you a fully integrated solution tailored to the needs of community and public foundations. Contact tracking/CRM, grant and scholarship management, donor tracking, gift/pledge processing and fund accounting come together in a single system to increase efficiency and improve accuracy, all with the convenience of a cloud-based platform.

Software That Works the Way You Do

- › CRM, grant and scholarship management, donor tracking, gift/pledge processing, and fund accounting in a single system
- › Convenience of the cloud: access your data anywhere, anytime, even offline!
- › Streamline your process and automate tasks with customizable workflows
- › State-of-the-art integration with Microsoft Outlook, Word, Excel and SharePoint
- › Customizable dashboards, reports and data views
- › Use in multiple languages or currencies
- › Numerous integration opportunities including GuideStar® Charity Check, geocoding and bridge to accounting
- › Optional online applicant and reviewer portal with eGrant.net
- › Optional online donor portal with Fundweb.net

Experience the Bromelkamp Company Difference – Connected. Committed. Creative.

- › **Connected** to our customer: Foundation management from your point of view, not ours.
- › **Committed** to outstanding service: Superior service begins with our first contact and lasts a lifetime.
- › **Creative** design for inspired solutions: Flexible solutions created to work the way you do.

At Bromelkamp, we are committed to outstanding service and provide personalized customer support. Guaranteed. In fact, we have unparalleled support in the industry because we offer exceptional training and service and focus on customer satisfaction, not on contracts.



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Manage Relationships: Contacts Tracking & CRM

- › Get a 360° view of your constituents
- › Map three-dimensional connections between individuals and organizations
- › View a comprehensive communication history for each contact including phone calls, appointments, email, faxes and more
- › Facilitate collaboration and communication through two-way integration with Microsoft Outlook

The screenshot displays a CRM profile for 'Asian Youth Outreach, Inc.' with the following details:

- Primary Contact:** Deborah Fong
- Tax ID:** 84-1553945
- Service Area:** Greater Metro
- Total Grants:** \$22,000.00

Summary

ACCOUNT INFORMATION

- Constituent Name: Asian Youth Outreach, Inc.
- AKA: AYO
- Department: **
- Institution Type: non-profit organization
- Phone: 877-767-6703
- Fax: 555-212-3498
- Website: <http://www.asianyouthoutreach.org>
- Parent Constituent: **

ADDRESS

- 402 Main St
- Anita, IA 50020-1032
- Address 1: Latitude: 41.44730
- Address 1: Longitude: -94.70077

POSTS ACTIVITIES NOTES

- call Deborah about new budget
Due Date: 1/10/2017 8:00 AM
Modified by: Meghan Davignon 10/26/2016 10:47 AM
- Akoya Tester
Your grant award 00045 CRM 0003011
3/7/2016 3:53 PM
- Follow up with Grace
Call her!
Completed by: Meghan Davignon 8/18/2016 10:35 AM
- Deborah Fong : Grace Taylor :
Notes about call
Completed by: Meghan Davignon 4/18/2016 2:28 PM

General Email: info@asianyouthoutreach.org

Primary Contact: Deborah Fong

Email Address: dfong@asianyouthoutreach.org

Business: 888-555-1212

CONTACTS

Full Name	Job Title
Deborah Fong	Director
Grace Taylor	Program Administrator

Streamline Your Grants Process

- › Track every phase of the process, from letter of intent to final report
- › View complete applicant history in one place
- › Accommodate multi-year, challenge, sponsorship and matching grants, or grants with multiple and varied installments and contingencies
- › Automatically alert stakeholders about key milestones
- › Set and monitor program budgets

The screenshot displays a 'Request Associated View' for 'Asian Youth Outreach, Inc.' with the following data:

Request #	Title	Program	Decision Date	Requested Amount	Grant Amount	Request Status
00005	2015 Operating Support	Operating Support	12/15/2014	\$10,000.00	\$10,000.00	Approved
00006	Outreach America	Discretionary	9/1/2014	\$2,500.00	\$0.00	Denied
00045	Request for 2017 Funding	Operating Support	11/7/2016	\$10,000.00	\$10,000.00	Approved



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Automate Tasks

- › Use workflows to automatically create or update records, send email, schedule reminders, and more
- › Implement several actions at once for a single record or a batch
- › Create business process flows to guide users and streamline data entry

The screenshot displays a grant request management interface. At the top, there are navigation options: NEW, DEACTIVATE, DELETE, ASSIGN, SHARE, EMAIL A LINK, and RUN WORKFLOW. The main header shows the request ID '00049' and key metrics: Request Status (Approved), Decision Date (2/15/2017), Requested Amount (\$55,000.00), and Grant Amount (\$55,000.00). A workflow progress bar indicates the current stage is 'Application (Active)', with previous stages 'Letter Of Intent' and 'Payment' completed. Below the workflow, a table lists key dates and amounts: Program (Operating Support), Begin Date (1/1/2017), End Date (12/31/2017), Project Area (city/county), Total Project Expenses (\$425,000.00), Site Visit Date (2/6/2017), Original Grant (\$55,000.00), and Board Meeting (2/15/2017). A 'Summary' section on the left provides details for the request, including the primary contact (Brian Waters), applicant (ABC Foundation), title (2017 Operating Support), program (Operating Support), requested amount (\$55,000.00), budget type, request status (Approved), and special request status. An 'ACTIVITIES' section shows a recent activity by Akoya Tester regarding the grant award. A right-hand sidebar displays contact information for Brian Waters, including his full name, title, method of contact (Any), email (Brian@MCC.org), and business phone.

Powerful Reporting and Data Analytics

- › Easily create and modify reports using the Report Wizard
- › Find the data you need with intuitive search and filter tools
- › Track both quantitative and qualitative outcomes
- › Export data to Excel, CSV, XML, PDF, WORD, MHGML or TIFF

The screenshot shows a Microsoft Dynamics CRM dashboard for 'GRANTS MANAGEM...'. The dashboard is titled 'Grant Request Status' and features three main components. On the left, a 'Request Status Summary' bar chart shows the count of requests by status: Approved (21), Denied (8), and Pending (22). In the center, a 'New Submitters' table lists recent requests with columns for Request #, Applicant, and Requested Amount. On the right, an 'Awards by Program' pie chart displays the distribution of awards across different program categories: Community Building, Discretionary, and Education. The dashboard also includes a search bar, a 'Create' button, and a user profile for Meghan Davignon.

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Dynamic Fund Management

- › Manage fund creation, purpose, requirements and other details
- › Relate all involved parties; advisors, investors, report recipients, beneficiaries
- › View real-time fund balances, contribution and grant history
- › Automatically create online donor statements with Fundweb.net (Optional)

The screenshot shows the 'Fund Detail' page for Fund 007. At the top, there are navigation buttons: '+ NEW', 'DEACTIVATE', 'DELETE', 'EMAIL A LINK', 'RUN WORKFLOW', 'START DIALOG', and 'RUN REPORT'. The fund name is 'Aspen Family' and the fund type is 'Donor Advised'. Key financial metrics are displayed: Net Assets at \$31,381.54 and Spendable at \$11,251.00. The fund class is 'Endowment' and the instrument is 'Bequest', established on 6/30/2004 with an initial amount of \$50,000.00. The purpose is 'To support projects that focus on health and families.' Below this, an 'Activity' section shows 'Gifts Paid' at \$142,615.54, 'Gifts Pending' at \$150.00, 'Grants Paid' at \$111,234.00, and 'Grants Pending' at \$0.00. Two tables are visible: 'Gifts to Fund' and 'Grants from Fund'. The 'Gifts to Fund' table has columns for Gift Number, Donor, Posting Date, Amount, Folio, and Paye. The 'Grants from Fund' table has columns for Request #, Request Applicant, Title (Request #), Amount, and Pi.

Gift Number	Donor	Posting Date	Amount	Folio	Paye
0003	Andrea Lenore and Andrew L. Ward...	4/8/2014	\$150.00		0022
0039	Karen Bromelkamp	2/9/2016	\$9,876.54 REVERSED		0037

Request #	Request Applicant	Title (Request #)	Amount	Pi
0058	Books for Africa	Grant for Books	\$1,234.00	
0011	Jordan Trust	Phase II	\$50,000.00	

Comprehensive Fund Accounting

Bromelkamp Company is pleased to offer an integrated, cloud-based fund accounting system with Community Akoya.net. In addition to fulfilling baseline accounting requirements (accounts payable/receivable, cash management, customizable reporting), it also addresses the unique needs of a community foundation, including:

- › Joint Investment Allocation
- › Fund Fee Assessment
- › Spendable Allotment
- › Fund Auto-balancing

The screenshot shows the 'Fund Fees' setup screen in the Akoya.net system. The navigation bar includes 'Dashboard', 'Reports', 'Company', 'Cash Management', 'General Ledger', 'Accounts Payable', 'Accounts Receivable', 'Platform Services', and 'Akoya.net'. The main heading is 'Fund Fees'. Below the heading, there is a descriptive text: 'This process will create an entry in the General Journal to charge an administrative fee to each fund for a specific period, based on a percentage of the assets of each fund.' There are three input fields: 'Enter the ending date of the period on which the fees should be based.' (12/31/2016), 'Enter the number of months the fees will cover (the months since the last time fees were charged):' (12), and 'Posting Date:' (1/1/2017). At the bottom, there are buttons for 'Post Fund Fees', 'Export', and 'Clear'.



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Enhance Your Fundraising

- › Maintain donor and prospect profiles in one location
- › View comprehensive giving history, including gift details
- › Develop campaigns and appeals, analyze success and return on investment
- › Track event details, including attendance lists, table numbers, meal selection, and fair market value for goods received

The screenshot shows the 'Bromelkamp Company Gives Back' event page. It includes fields for Event Name, Date (7/15/16), Location (Leopold Elementary School), and Type (Volunteering). It also displays an 'INVITATIONS' section with counts for Accepted (2) and Declined (0), and a 'VOLUNTEER SUMMARY' section showing 2 Employee Volunteers and 4.90 Non-Employee Hours.

Simplify Gift and Pledge Processing

- › Process traditional gifts, as well as matching gifts and challenge grants, memorial/honorary gifts, in-kind donations, gifts of stock, and other non-cash contributions
- › Track pledges; automatically generate reminders for donors
- › Generate personalized acknowledgements automatically

The screenshot shows a report titled 'Giving Over Past 12 Months'. It features a table of gift records and a bar chart titled 'Gifts Committed by Month'. The table lists donor names, commitment amounts, and dates. The bar chart shows monthly commitment totals from April 2016 to December 2016.

Gift #	Donor Name	Commitment	Gift Date
0051	Brian Smith	\$77.00	12/12/2016
0056	Jason Broomfield	\$11.50	12/11/2016
0057	Jessica Rainings	\$27.27	12/10/2016
0048	Brian Smith	\$55.00	12/5/2016
0049	David Wertheim	\$77.00	12/5/2016
0048	Dana Kraft	\$86.00	12/4/2016
0052	Deanna Meyer	\$88.00	11/28/2016
0054	Dana Kraft	\$48.00	11/18/2016
0071	Greg Chenut	\$67.00	11/18/2016
0058	Henry Albof	\$250.00	11/18/2016
0044	Bruce Andersen	\$1,600.00	11/10/2016
0048	Sam Smead	\$230.00	11/10/2016
0045	Deb Smith	\$100.00	11/9/2016
0043	Karen Bromelkamp	\$148.00	11/9/2016

Month (Gift Date)	New Commitment (\$)
Apr 2016	\$100.00
May 2016	\$105.00
Jun 2016	\$112.00
Jul 2016	\$12,900.00
Aug 2016	\$840.00
Sep 2016	\$3,000.00
Oct 2016	\$882.00
Nov 2016	\$8,928.00
Dec 2016	\$213.77



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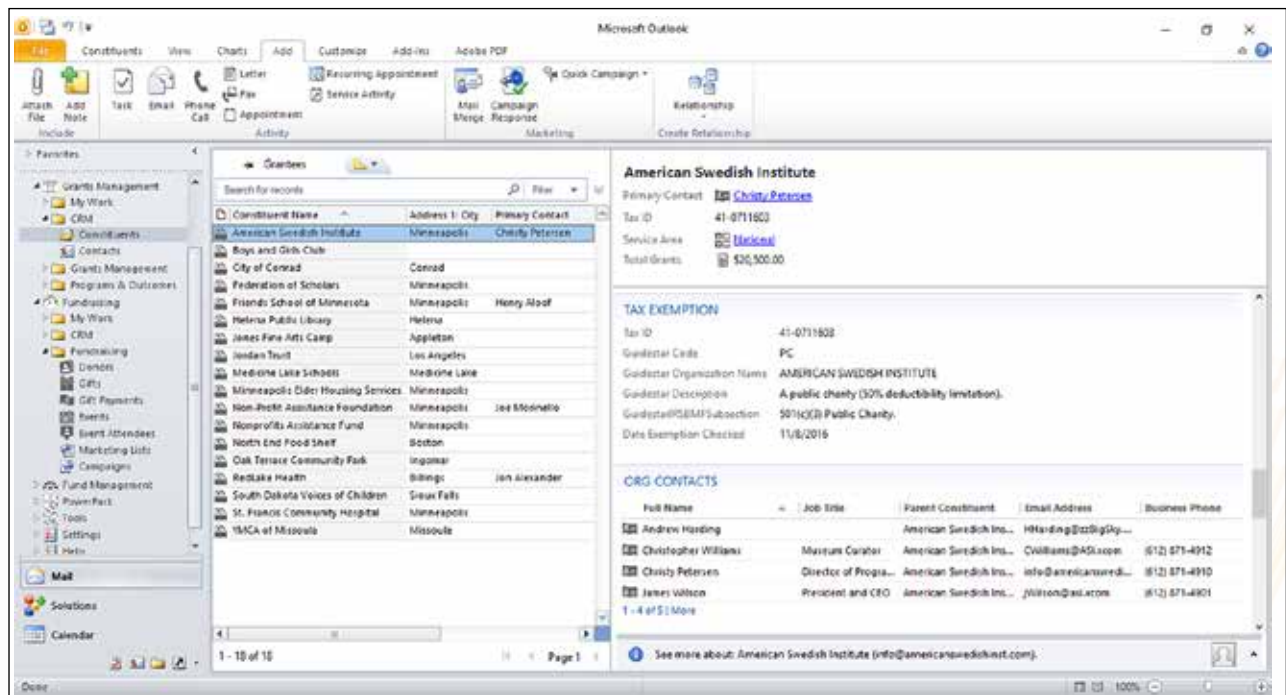


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Integrate with Microsoft Office and More

- › Synchronize contacts, email, tasks and appointments with Microsoft Outlook
- › Create and customize merge documents with Microsoft Word
- › Easily export to Microsoft Excel; save dynamic spreadsheets and refresh data without re-exporting
- › Access all your data through Microsoft Outlook integration; work offline and synchronize later
- › Optional integrations include GuideStar® Charity Check, Geocoder, OFAC Anti-Terrorism Compliance, QuickBooks® Bridge, SWIFT Code Validation
- › Ask us about custom integration!



Administer Your Own Database

- › Add, change and delete fields to fit your process
- › Modify code lists with ease
- › Automatically identify and easily merge duplicate records
- › Import and export data
- › Manage user roles and security



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