Foundation Management for Community & Public Foundations

Community Akoya.net

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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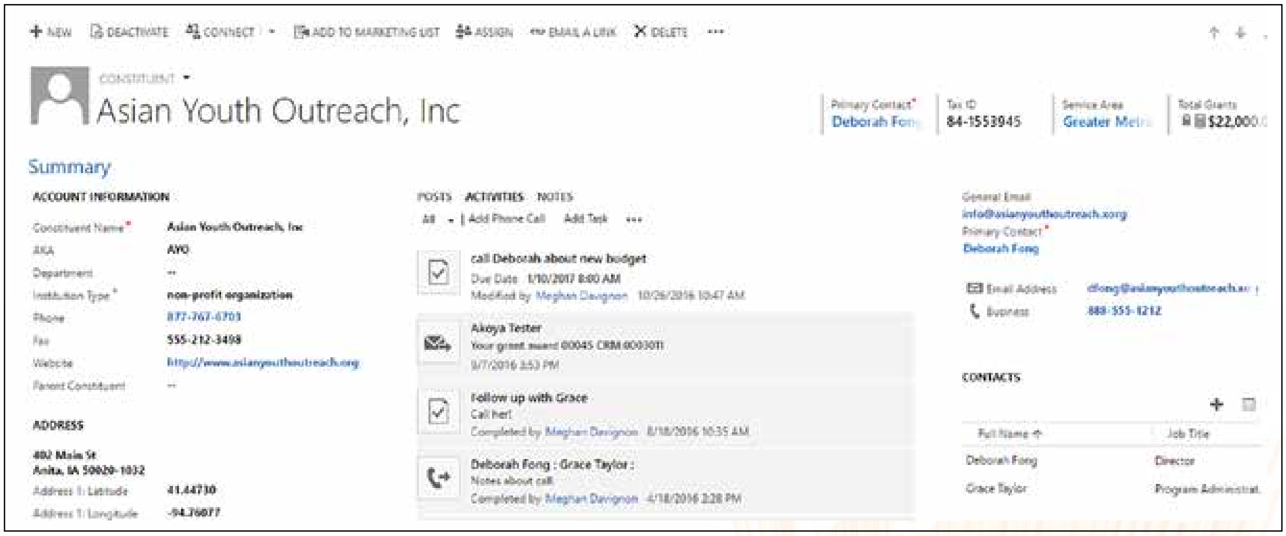
Foundation Management for Community & Public Foundations

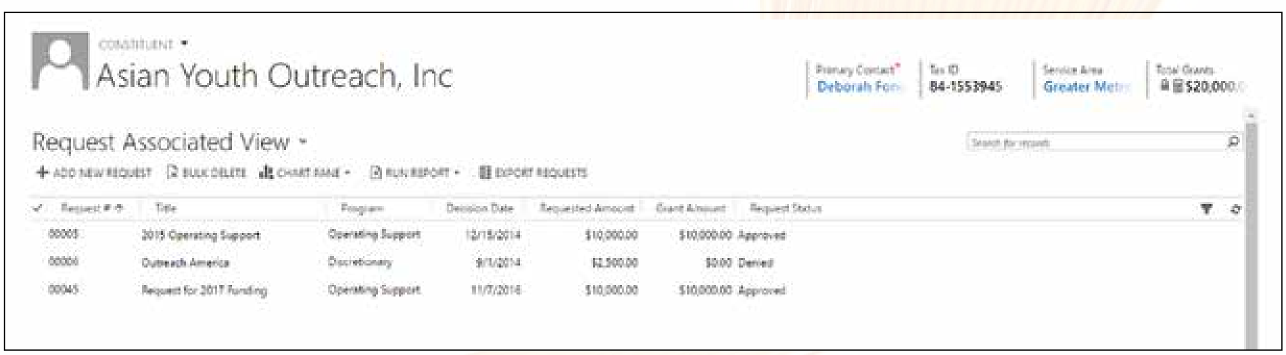
Manage Relationships: Contacts Tracking & CRM

- 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



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



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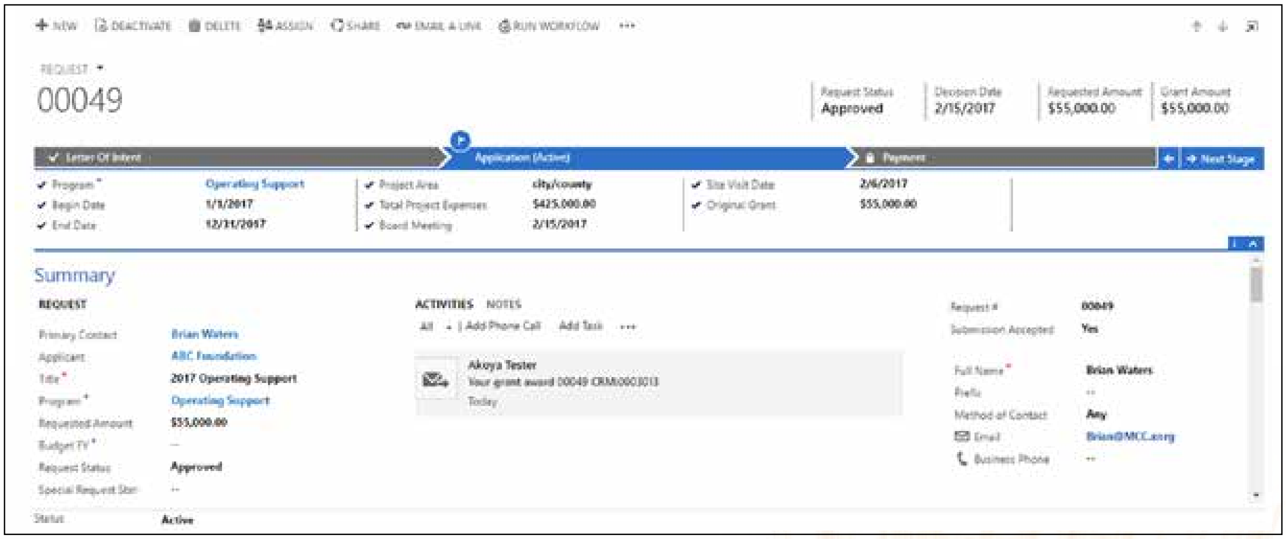
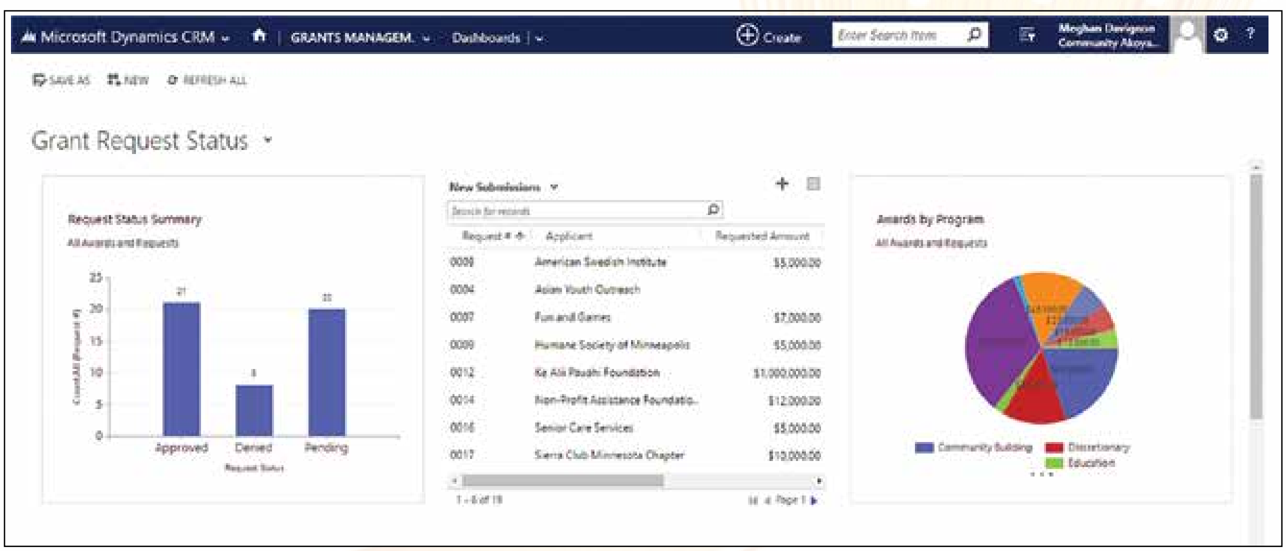
Automate Tasks

› 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



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



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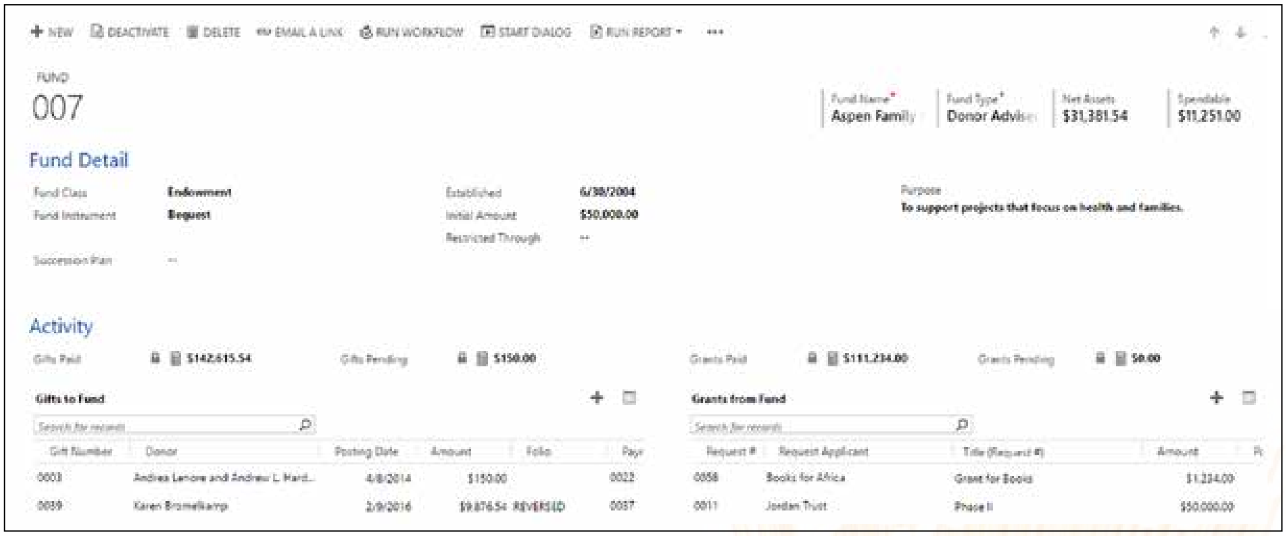
Dynamic Fund Management

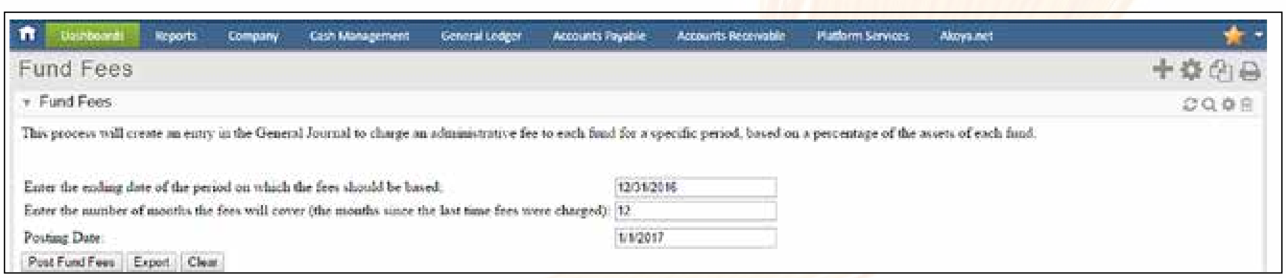
- Manage fund creation, purpose, requirements and other details
- Relate all involved parties; advisors, investors, report recipients, beneficiaries
- View real-time fund balances, contribution and grant history
- Automatically create online donor statements with Fundweb.net (Optional)



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



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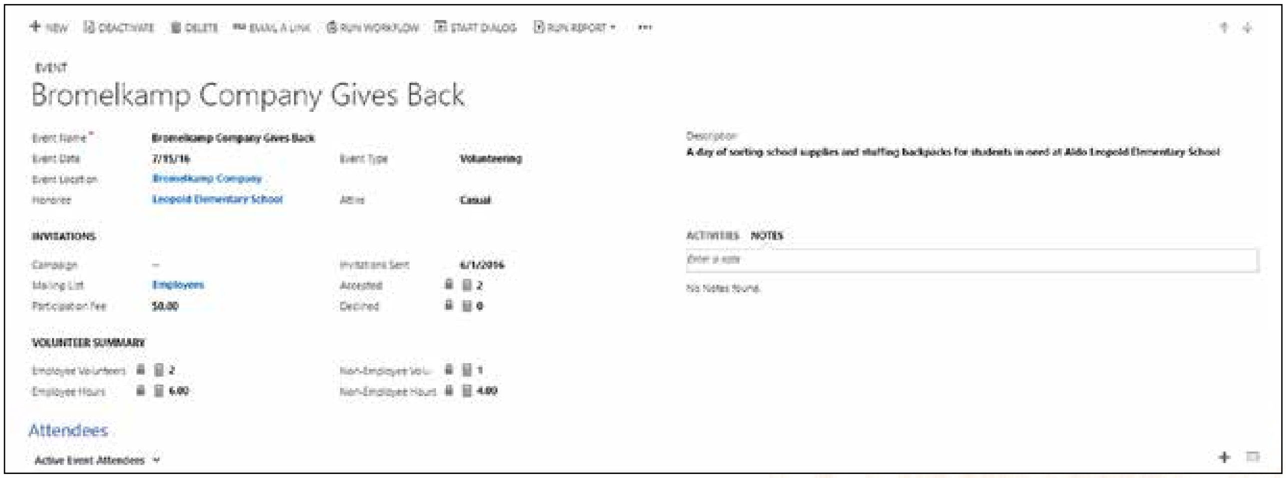
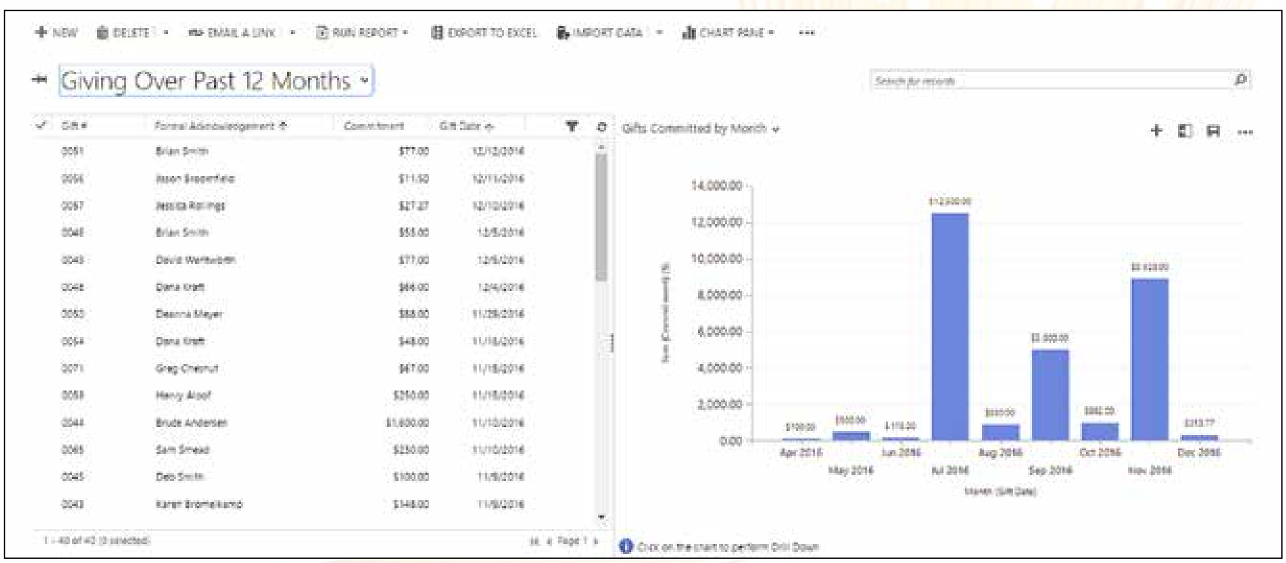
Enhance Your Fundraising

- 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



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



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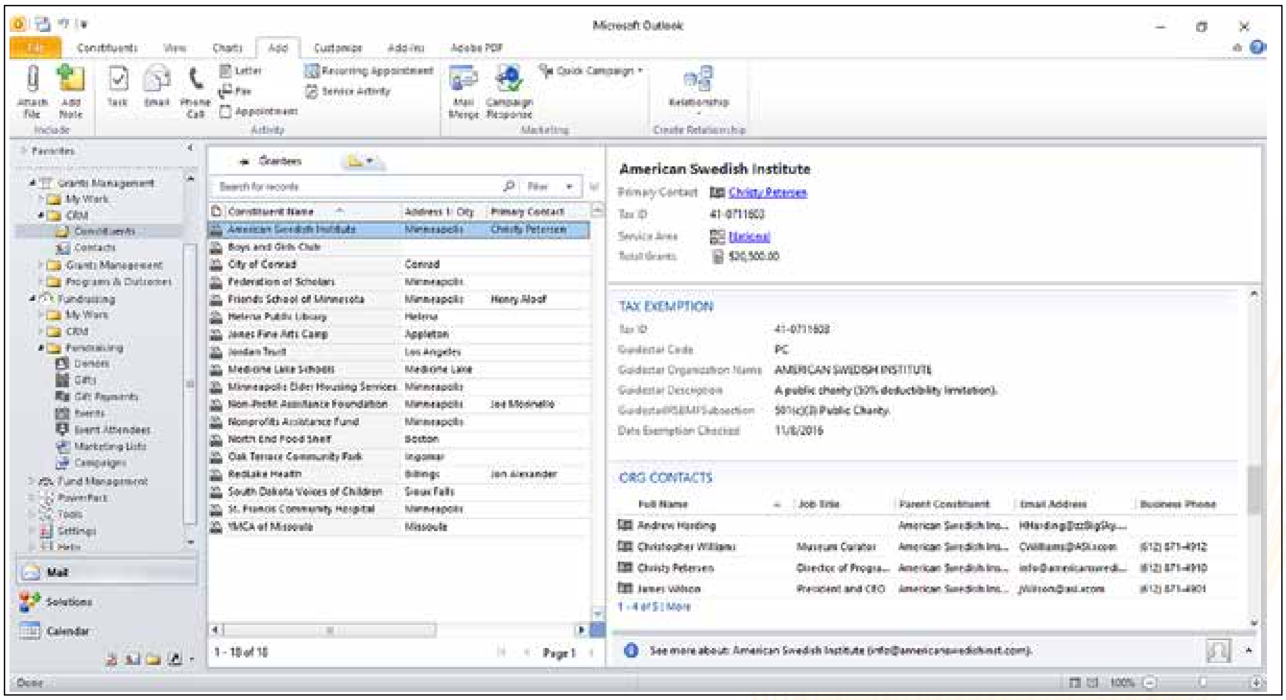
Integrate with Microsoft Office and More

- 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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