

CRM & Grant Management for Private & Family Foundations



First Akoya.net harnesses the power of Microsoft Dynamics CRM to bring you a fully integrated solution tailored to the needs of private and family foundations. Contact tracking/CRM, grant and scholarship management 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 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

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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CRM & Grant Management for Private & Family 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

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: -94.76077

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 0001011
3/7/2016 2:53 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 Administrat.

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 table:

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	9/11/2014	\$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 CRM record for a grant request with ID 00049. The record is in the 'Application (Active)' stage. Key details include:

- Request Status:** Approved
- Decision Date:** 2/15/2017
- Requested Amount:** \$55,000.00
- Grant Amount:** \$55,000.00

The workflow shows stages: Letter Of Intent, Application (Active), and Payment. The 'Application (Active)' stage is expanded to show details:

- Program:** Operating Support
- Project Area:** city/county
- Site Visit Date:** 2/16/2017
- Original Grant:** \$55,000.00
- Begin Date:** 1/1/2017
- Total Project Expenses:** \$425,000.00
- Board Meeting:** 2/15/2017
- End Date:** 12/31/2017

A 'Summary' section provides a quick overview of the request, including the primary contact (Brian Waters), applicant (ABC Foundation), and request status (Approved). An 'ACTIVITIES' section shows a recent note from Akoya Tester regarding the grant award.

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 CRM dashboard titled 'Grant Request Status'. It features three main components:

- Request Status Summary:** A bar chart showing the count of all requests by status. The data is as follows:

Status	Count
Approved	21
Denied	8
Pending	20
- New Submissions:** A table listing recent grant submissions with columns for Request #, Applicant, and Requested Amount.

Request #	Applicant	Requested Amount
0008	American Swedish Institute	\$5,000.00
0004	Asian Youth Outreach	
0007	Fun and Games	\$7,000.00
0009	Humane Society of Minneapolis	\$5,000.00
0012	Ka Ahi Paoli Foundation	\$1,000,000.00
0014	Non-Profit Assistance Foundatio...	\$12,000.00
0016	Senior Care Services	\$5,000.00
0017	Sierra Club Minnesota Chapter	\$10,000.00
- Awards by Program:** A pie chart showing the distribution of awards across different program categories. The categories are: Community Building, Discretionary, and Education.



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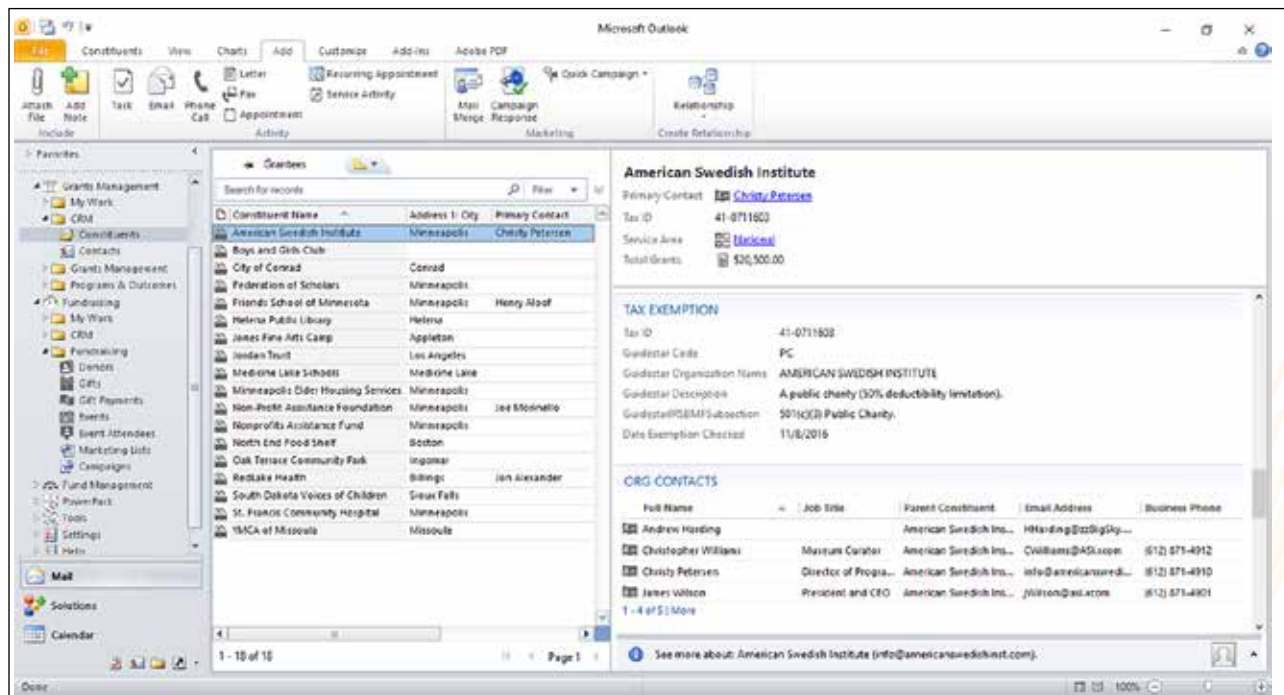


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Integrate with Microsoft Office and More

- › 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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