

GREATER PUBLIC

membership

Database / CRM Conversion CHECKLIST

- Contact, organization, and household account options
- Seasonal address management
- Affiliations
- Nonprofit relationship management
- Volunteer management
- Basic membership functionality
- Basic batch entry
- Gift, pledge, and soft credit management
- Accounting reconciliation management
- Payment processing
- Recurring donation management, including multiple concurrent gifts
- EFT processing
- Direct response segmentation tools, including random A/B split tests
- Campaign planning and execution
- Standard analytical report suite
- Customizable reports and queries
- Gift and pledge tracking reports
- Honor and memorial gift tracking
- Task and event tracking
- Email integration with Outlook, Gmail
- Mass email send capability
- Email templates and tracking
- Automatic acknowledgements
- Online donation form builder
- Integration via web services API
- Mobile access
- Offline access
- Content library
- Customizable dashboards
- Analytics snapshots
- Product and premium tracking
- Inventory management
- Real-time updates
- Customizable forecasts
- Ideas community
- Workflow and approval automation
- Engagement teams
- Visual workflow
- Call scripting
- Customizable user rights
- Profile layouts and field-level security
- Custom apps and websites
- Developer sandbox
- Multi-channel fundraising
- Corporate and foundation giving
- Web-to-lead capture
- Lead scoring, routing, and assignment
- Contract management
- Moves management and major gift tracking and reporting
- Planned giving management
- Grants management
- Event management
- Table seating charts and tools