

Fundraising Software Product Comparison

Y/N Standard Cost Notes

Section 1: Vendor Background and Service	Y/N	Standard	Cost	Notes
Product Name				
Company Name				
Years in Business				
Software Cost Estimate				
Annual Maintenance				
Updates and upgrades included with Maintenance				
Conversion Services				
Conversion Estimate				
Training Options				
Training Costs				
Support Site				
Section 2: System Requirements	Y/N	Standard	Cost	Notes
Section 2a: Workstation				
Operating Systems				
Recommended CPU				
Recommended RAM				
Recommended Disk Space				
Section 2b: Server Requirements				
Operating Systems				
Recommended CPU				
Recommended RAM				
Recommended Disk Space				
Section 2c: Database Requirements				
Supported Databases				
Section 2d: Remote Access				
Remote Access Options Supported				
Hosting Service Available				
Section 3: Feature Set	Y/N	Standard	Cost	Notes
Section 3a: Demographic Data				
Store multiple addresses per constituent				
Rules based naming conventions				
Rules for naming conventions can be overridden				
Track email and send from within the application				
Associate solicitors with constituents				
Duplicate checking				
Track company records and their employees				
Auto-fill City, State, County by Zip Code				
Joint and separate constituent records supported				
Section 3b: Donor Cultivation				
Support step-by-step cultivation process				
Popup Reminders for contacts (touches)				
Solicitor Reports, Cultivation Reports, Profile Reports				
Store capacity to give				
Store research data				
Support multiple cultivators for each constituent and contact (touch)				
Track Interests				
Track educational/professional background				
Track photos, word processing, spreadsheet, etc. files for each contact (touch)				
Track Planned Giving Intentions				
Section 3c: Direct Mail				
Fully seamless mail merge with industry standard word processors (From document creation to full merge)				
Seamless Email merge				
Seamless Fax merge				
Segmentation capability (RFA analysis and other constituent information)				

	Y/N	Standard	Cost	Notes
File Exports for Mail Houses				
Automated Seasonal Address selection				
Expansion and reduction by corporation, household, teams, etc.				
Gift Acknowledgments, Pledge Acknowledgments, Reminders, etc.				
Embeddable bar codes for gift, pledge, payment receipting				
Section 3d: Campaigns and Appeals				
Code and Define Campaigns				
Code and Define Appeals				
Associate Appeals with specific Campaigns				
Track Campaign and Appeal Expense and Goals				
Track itemized Appeal expenses				
Performance Reports detailing donations, expenses, percent of goal met, Cost per Donation, etc.				
Trend Reports				
Projected income reports and gift charts to find potential donors to meet 20%, 70% etc. of campaign and fund goals, as well as overall expected income.				
Section 3e: Gifts				
Split Gifts				
Track solicitor per gift				
Matching Gifts				
Tribute Gifts (Honor/Memorial)				
Soft Credits				
In-Kind Gifts				
Credit Card Gifts				
Complete Giving History				
Automated Giving Levels				
Customized Gift Fields				
Process for handling Gifts made online				
GL Export or interface				
Batch Entry of Gifts				
Audit trail				
Individualized acknowledgments				
Recurring Giving functionality				
Section 3f: Pledges				
Automatically build payment schedules				
Support user-defined payments schedules				
Matching Pledges				
Track a solicitor for a pledge				
Tribute Pledges (Honor/Memorial)				
Pledge Reminders				
Projected Income Reports				
Write off pledges				
Customizable fields				
Outstanding Pledge Reports				
Section 3g: Membership				
Various levels of membership				
Discounts				
Membership renewal notices				
Print membership cards				
Section 3h: Events				
Galas, Walk-A-Thons, etc.				
Produce invitations, registrations, etc.				
Track budgets, goals, expenses				
Identify ticket levels				
Generate name tags, place cards, seating charts, etc.				
Track event attendance, sponsorship, etc.				
Section 3i: Customization				
User-definable drop-down values				
User-definable required fields				

	Y/N	Standard	Cost	Notes
Customizable data entry forms				
User-definable default field values				
User-definable tables and fields				
Custom report creation				
API available				
Section 3j: Security				
Security available at user and workgroup level				
Ability to set rights to edit gifts after posting				
Section 4: Data Retrieval and Reporting				
Section4a: Query				
Query any field				
Save Query				
Build Reports off Query				
Export query results to text or Excel				
Secure Query by User, Workgroup, or Global access				
Section 4b: Reports				
Standard reports				
Custom reports				
Export reports in various formats (PDF, MAPI email, Word, HTML, etc.)				
Dynamic reports (Users have options to choose to vary report results)				
Section 5: Import/Export				
Section 5a: Import				
Import Utility Exists				
Import Utility supports using another application's identifier as link				
Imports can be scheduled				
Gifts can be imported				
Addresses can be imported				
Custom table data can be imported				
Other data can be imported				
Section 5b: Export				
Export in multiple formats (ASCII text, Excel, etc.)				
Export formats can be saved				
Export any data				
Export reports in various formats (PDF, MAPI email, Word, HTML, etc.)				