blackbaud™

Luminate CRM®

Advanced CRM & Analytics for Nonprofits

Luminate CRM helps nonprofits like yours build stronger relationships with all of your supporters, whether prospects, donors, volunteers, advocates, or beneficiaries of your programs. Much more than a donor database, Luminate CRM gives your organization a complete view of your constituent relationships and powerful analytical capabilities to support direct response and business intelligence.

Luminate CRM is open, customizable and cloud-based so it is accessible from anywhere, anytime. Now you can track and securely manage all of your supporter data in one place—without the limitations and hassles of data silos.

Complete Relationship Management & Analytics for Nonprofits

Luminate CRM helps you engage constituents and deepen loyalty by giving you a more complete understanding of your supporters and an organization-wide toolset for managing every relationship.

- **Focus on your mission, not on technology.** There is no hardware to purchase and maintain, no software to upgrade, and no data storage limit. Luminate CRM is designed for usability and adoption with minimal training needed.

- **Effectively manage all of your supporters—not just donors.** Perform more meaningful analysis with a single, complete view of constituents.

- **Use industry leading CRM technology.** Built on the Salesforce.com Platform™, Luminate CRM is designed specifically for nonprofits with an enterprise scale underlying infrastructure.

- **Mobile.** Luminate CRM is mobile-ready with access through the Salesforce1 mobile app or via a web browser. The interface has been optimized for major gift officers on-the-go with information streamlined for mobile devices. It follows all usability standards for mobile users.

- **APIs & Integration.** Integrate Luminate CRM with other applications in your environment by leveraging the open Salesforce API™.

- **Get the answers you always wanted, now.** Luminate CRM includes a sophisticated data warehouse which enables analytical capabilities and business intelligence not available in any other nonprofit solution.

- **Wealth Analytics.** Better identify supporters that have a higher capacity to give and engage them in the most appropriate ways to achieve their philanthropic goals.

- **Go ahead, customize it.** Easily add new fields, change page layouts, restrict views and data access, create custom workflows, and even design new modules to serve your unique needs. Users can easily build custom reports and dashboards on their own.
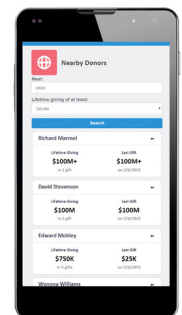
Constituent Relationship Management

Access all your contact data in one place. Link contacts to households and organizations and define relationship types to create a complete profile of all of your supporters.

- **Rest easy knowing your data is secure.** Bank-grade security with automatic backups with available field-level auditing for additional tracking.

- **Classification Types.** Assign constituents one or many classification types (e.g. Volunteer, Major Donor, Board Member, etc.) for segmentation and reporting.

- **Quick & Advanced Search.** Easily search a subset or the entire database using partial text and wildcard characters.

- **Householding.** Link two or more constituents together as a household to share mailing addresses and compile household donation summaries.

- **Integrated Wealth Scores.** Understand the affinity and capacity of your constituents to give in large amounts.

- **Multiple Address Tracking.** Store seasonal or alternate addresses and keep track of all address changes for rollback or de-duplication.
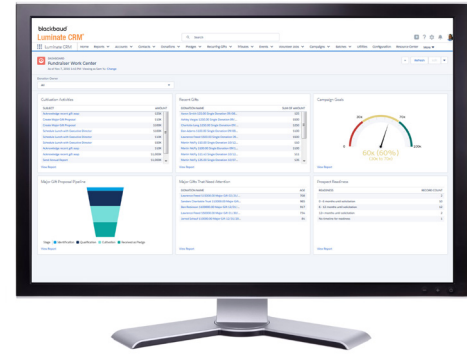
- **Notes & Attachments.** Log multiple notes or attach documents to individual contacts.

- **Tasks & Events.** Manage follow-up tasks and create calendar events for individuals or based on specific constituent interactions.

- **Microsoft® Outlook Integration.** Use the Intellisync® plug-in to integrate Outlook data and enable email tracking.

Donation Management

Track all gifts, process transactions, manage sustaining donors, build revenue forecasts, find prospective donors and monitor major donor opportunities all from one application.

- **Single Gift.** Quickly track gift transactions with payment and reference information.

- **Recurring Gifts.** Manage a recurring series of payments on a donor-specific schedule.

- **Pledge Gifts.** Manage committed donations with multiple installments and forecast gift income for future periods.

- **Planned Gifts.** Monitor your multi-stage planned giving opportunities and commitments for individual donors.

- **Major Gifts.** Identify and track major gift opportunities, forecast anticipated income and manage interactions to coordinate team efforts.

- **Batch Gift Entry.** Select data entry fields and determine validation rules, then create batches of gift records for simple large-scale gift entry.

- **Matching Gift Tracking.** Manage a listing of organizational or individual matching gift commitments, then track all received gifts through fulfillment.

Donation Management (Continued)

- **Gift Designations.** Split individual donations by program or fund code for accounting and reporting purposes.

- **Summary Giving Totals.** Automatically calculate cumulative giving summaries for individual, household and organization records.

- **Soft Credits.** Automatically create donation transactions for household members or other contacts based on relationship rules or gift instructions.

- **Revenue Forecasting.** Predict future income based on committed gifts and gift opportunities.

- **Memorial / Honor Gifts.** Track memorial and honor gift notifications, personal messages and donor preferences.

- **Tribute Gifts.** Create tribute campaigns and track multiple individual donations and supporter relationships.

- **General Ledger Export.** Provide accounting with pre-formatting files with all of the debit and credit codes pre-applied to every gift for quick input to external fund accounting products.

Relationship Management

Build relationships between individuals, organizations, or both using graphical tools that simplify tracking and foster better relationship management.

- **Relationship Tracking & Search.** Query an individual contact for known relationships, or search the entire database for contacts with a specific type of relationship.

- **Custom Relationship Types.** Customize the types of relationships available to associate with individuals or organizations.

- **Automatic Relationship Assignment.** Create links between tribute donors and honorees, TeamRaiser™ event participants and other records based on custom workflow rules.

Direct Marketing

Structure, segment and analyze your multi-part campaigns for direct mail or other marketing efforts with Luminate CRM. Manage your campaigns in-house, or enlist Blackbaud Services for full service bureau support for campaign management.

- **Step-by-Step Campaign Builder.** A campaign setup wizard assists basic users, such as your small affiliates, in applying the proper campaign-appeal structure. Advanced users can easily bypass the wizard.

- **Hierarchical Campaigns.** Manage campaigns and appeals within a parent-child data structure and group campaigns together to compile aggregate results, cost analysis and other valuable statistics.

- **Custom Campaign List Views.** Organize campaigns into sortable lists for individual or cross-team access to quickly find campaigns or compare results.

- **Query & List Creation.** Quickly build lists and export for use in targeted communications. Counts update as you update your criteria.

- **Segment Codes for Quick Data Entry.** Customize the types of relationships available to associate with individuals or organizations.

- **Quick Performance Tracking.** Get up-to-the-minute results for common metrics such as total donation count, total amount, average gift, response rate and cost per response.

Reporting & Dashboards

Start from scratch or clone an existing report and make it your own. Define summary counts, record a grouping, use simple or advanced filters and time-period criteria and share with other team members or keep private. Build multiple graphic dashboards for display on your start page and receive via email automatically.
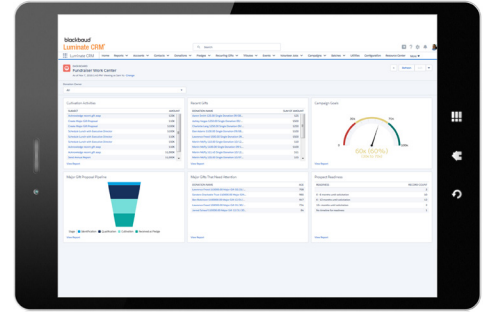
- **Report Wizard.** Use a step-by-step wizard to determine grouping, summary, field columns, criteria and graph options for any report.

- **Clone & Edit Reports.** Start from scratch or clone and edit an existing report.

- **Report Charts & Graphs.** Pick your graph style, colors and advanced options to create a visual graph for each report.

- **Report Filters.** Filter results by any database field or time parameter and use advanced operators to return specific results.

- **KPI Dashboards.** Build Key Performance Indicator dashboards that can appear on staff homepages and be delivered via email on a scheduled basis.

- **Report Folders & Tags.** Organize reports into logical folders, or "tag" a report with keywords to help retrieve for future needs.

- **Custom Report Formulas.** Use custom formulas to calculate results based on returned values in each report.

- **Conditional Highlighting.** Use color-coding to highlight specific values in report results based on conditional rules.

- **Export Report Details.** Export report results as .xls or .csv files.

- **Analytics Data Warehouse.** Data is automatically replicated from both Luminate Online™ and Luminate CRM in an optimized environment for high performance and complex reporting.

- **Operational Reporting.** Get the full picture of constituent interaction, with predefined reports, an ad hoc report designer, and complex dashboard builder.

Event Management

Track invitations and sponsorships, create and assign multiple attendee levels while recording all payments, event expenses, additional donations and in-kind gifts in one database.

- **Detailed Event Information.** Track date, time, location, capacity and more for every event, and add custom fields to supplement.

- **Status Summary Fields.** View at-a-glance updates on invitees, accepts, declines, expenses, etc.

- **Multiple Attendee Levels.** Offer multiple ticket levels for purchase based on the benefits you choose to include.

- **Sponsorship Levels & Management.** Offer sponsors multiple support

options with various benefits and track their associated signage and contacts in attendance.

- **Monitor Payment Status.** See which registrations and sponsorships have been paid, and which have outstanding payments to set payment schedules and follow up notifications.

- **Expense & In-Kind Gift Tracking.** Track all associated expenses, related vendors and how much, if any, of their products/services were delivered as an in-kind gift.

- **Integrated Mail Merge.** Produce merged invites, follow-ups and thank you letters with built-in tools that use Microsoft® Word mail merge features.

- **Event Check-In Manager.** Allow staff at the event to quickly and conveniently track who's actually attended and capture all associated guests.

- **Golf Teams.** Create teams and foursomes, assign start times, starting holes and golf carts, track overall scores and more.

Volunteer Management

Organize multi-shift volunteer jobs, select the desired and required qualifications and easily find available volunteers in the database whose availability and skills match upcoming shifts.

- **Volunteer Jobs with Multiple Shifts.** Track volunteer jobs with multiple shifts, locations and required qualifications.

- **Track Individual Availability & Skills.** Track volunteers' availability and record appropriate skills that can be used to match them with upcoming job shifts.

- **Participation Tracking & Reporting.** Track volunteer history for every individual shift, identify coverage gaps and monitor results through reports and dashboards.

- **Find Available & Qualified Volunteers.** Filter by availability or qualifications for every shift, or combine the two to quickly identify the best match for your next shift.

- **Manage Shift Registrations & Attendance.** Track prospects, registered volunteers and individuals on the wait list. Set maximum and minimum numbers of volunteers per shift and view quick summary counts per job.

Flexibility for Customizations

With client-tested usability, your team can easily customize Luminate CRM with 'clicks'—no coding required to create custom fields, improve page layouts and apply workflow rules and email notifications to meet your needs.

- **Custom Fields.** Create custom fields for virtually any object in the database, and select the field type, multi-select value options, validation rules and help text.

- **Custom Page Layouts.** Create and customize multiple page display, search and data-entry layouts based on the staff user roles of your organization and specific needs.

- **Custom Workflows.** Automatically assign follow-up tasks or trigger email notifications to staff based on field changes in the database.

- **Custom Email Notifications.** Create multiple email templates to notify staff or external individuals of changes in the database (e.g. major gift received).

- **Roles & Privileges.** Define multiple staff user roles that can be used to

determine access permissions, page layouts and workflow notifications.

- **Custom Calculations.** Combine two or more fields to calculate a new field value based on a pre-defined formula.

- **Custom Objects.** Develop completely new database tables and data relationships with page layouts and custom fields to meet your needs.

Import/Export Data & Integrate Other Systems

Import data to virtually every aspect of the database and take advantage of several pre-built plug-ins and integration tools to help develop more complex connections with your other applications.

- **Data Import Wizard.** Follow a step-by-step guide to add or update contact and account records.

- **Bulk Data Loader.** The Data Loader application allows for the bulk import or export of data. Use it to insert, update, delete, or extract records.

- **Export Any Report.** Create a report for any data then export to .xls or .csv files with two clicks.

- **Scheduled Bulk Export.** Automatically export a snapshot of your data on a regularly scheduled basis.

- **Enterprise Web Services API.** Integrate Luminate CRM with other applications to expose data objects and fields in the database.

- **Microsoft® Outlook & Lotus® Notes Integration.** Use Lotus Notes or Microsoft Outlook to manage information such as tasks, email and contacts without sacrificing data consistency.

- **Microsoft® Office Integration.** Create mail merge letter templates and import data to excel spreadsheets for analysis or editing.

- **Google® Apps Integration.** Integrate email, documents, presentations and spreadsheets automatically when using Google apps.

- **Salesforce AppExchange® Marketplace.** Browse, click and integrate with thousands of applications that have been built to integrate with the Force.com® platform.

Support for Affiliate & Chapter-Based Organizations

Luminate offers MultiCenter capabilities for organizations with multiple business units, including chapters, affiliates, separate 501(c)(3) and 501(c)(4) entities, or departments which need to manage data individually and at a roll-up level within a single system.

- **Assign Constituents to Affiliates.** Automatically assign constituents and/or households to specific affiliates, based on your business.

- **Share Constituents Across Centers.** Share a single constituent record across multiple units (centers) across the organization.

- **Roll-Up Reporting.** Run roll-up reporting across all organizations in your affiliate network.

Strategic Services

Let Us Help You Reach Your Constituent Enagement Goals

Whether you are new at using integrated marketing to engage constituents or you're ready to boost the effectiveness of your existing fundraising programs, the Strategic Services team can help you plan and execute a winning strategy for acquiring and engaging individuals and converting them into lasting supporters.

- **Integrated Strategy.** From defining priorities and setting goals to measuring success, we help you develop a multi-channel strategy that supports your objectives and integrates with your existing marketing and fundraising initiatives.

- **Campaign Management.** We help you plan and execute one-time or ongoing campaigns that include multiple online and offline channels. Services include campaign strategy, database segmentation, reporting and analysis—with project management services each step of the way.

- **Data Analytics.** Whether you need comprehensive analytical support or a one-time predictive modeling solution to improve your fundraising campaigns, we tailor our data analytics services to meet your specific needs.

- **Interactive Marketing Services.** For a boost to your web and email presence, we offer creative services including graphic design, information architecture, website analysis and interactive / multimedia projects.
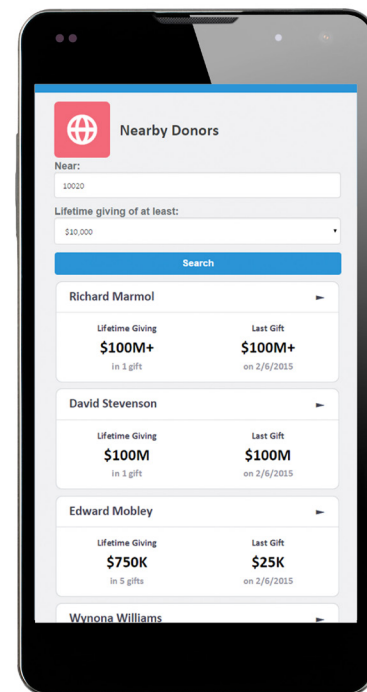
Next Steps

Let's Talk About How To Frame The Future

For more information on Luminate CRM, go to
www.blackbaud.com/luminate-crm
or contact your sales representative today.

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