

Inspired Design meets Dynamic Technology for Community & Public Foundations

Integrated online software that works the way you do. Now and in the future. Community Akoya.net integrates all essential functions for Community Foundations, including CRM/contact management, grant and gift management, and multi-faceted fund accounting powered by Intacct, automating essential functions like joint investment allocation, fund fees assessment, and spendable allotment. No server or maintenance needed because Community Akoya.net is fully online!



Software That Works the Way You Do

- › Use Community Akoya.net in the office, at home, or on the road—anywhere, anytime, even offline!
- › Easily customize the design to match your operations; add, change, and delete fields; merge templates; reports; customize personal views and dashboards
- › Manage user access with security settings
- › No installed software, no worry about backups
- › Avoid new infrastructure or extensive IT support costs
- › Data is protected with SSL encryption
- › Start quickly and learn fast with familiar Microsoft navigation and functions
- › Consolidate all your data in one place with a fully integrated solution
- › Easily import and export data
- › Automate and streamline your grants management and fundraising processes with customizable workflows
- › Employ industry best practices built right into the software
- › Available in 41 languages
- › Automate due diligence using GuideStar Charity Check (optional)
- › Integrate with eGrant.net for online application and reporting processes (optional)
- › Integrate with Fundweb.net for online donor statements (optional)

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 or annual fees.



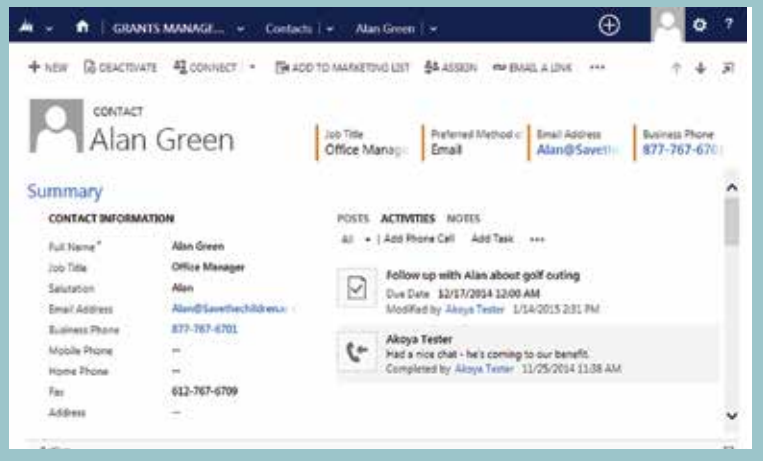
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Manage Relationships: Contacts Tracking/CRM

- › Get a 360° view of your constituents and contacts
- › Map and manage diverse connections between individuals and organizations, not just your grantees
- › Innovative CRM capabilities allow you to create and store letters, emails, phone calls, faxes, tasks and related documents in one place
- › CRM activities roll up to related records
- › Store multiple addresses per contact
- › Dynamic mailing lists update themselves as your constituency changes
- › Integrate with MailChimp (optional)

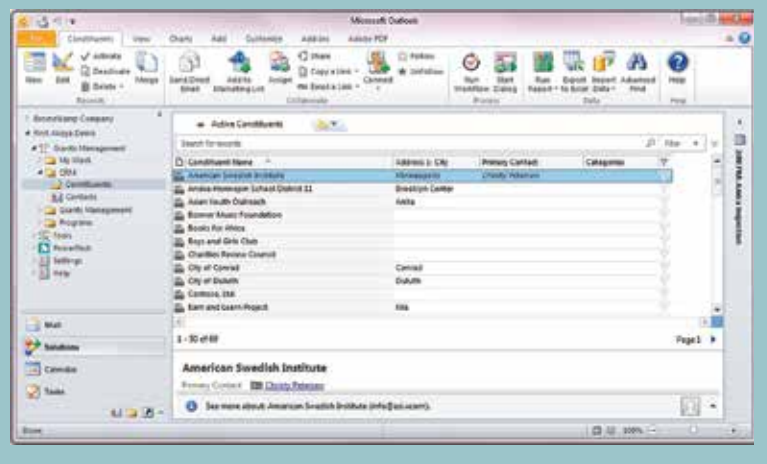
Cutting Edge CRM



Integrate with Microsoft Office

- › Work in the database through Outlook, even offline, and automatically synchronize with Community Akoya.net when you reconnect
- › Contacts, emails, appointments and tasks set in Outlook or Community Akoya.net appear in both places automatically
- › Use included email and Word merge templates or build your own
- › Easily export data to Excel; create dynamic spreadsheets and update exported data with the click of a button

Two-way Communication with Outlook



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Streamline Your Grant Process

- › Manage timelines, correspondence and review process
- › Track multiple grant phases, like letters of intent
- › Alert stakeholders on key granting milestones automatically
- › Schedule and track multiple reports/requirements and payments easily and flexibly
- › View complete applicant history in one place
- › Accommodate multi-year, challenge and matching grants, or grants with multiple and varied installments and contingencies
- › Analyze past and current activity for research and program evaluation
- › Eliminate paper files with online folders (Optionally, integrate with SharePoint)

Comprehensive Grant History

Payments	Posting Date	Amount	Acct	Payment Date	Payee
00002	12/15/2014	\$2,000.00	CG1497	12/15/2014	American Swedish Institut
00003	6/30/2015	\$2,000.00			American Swedish Institut

Automate Tasks

- › Trigger automatic action with customizable workflows
- › Create or update records, send email, generate reports, schedule reminders, and more with the click of a button
- › Ensure consistency as well as data and process integrity
- › Launch custom processes on demand or automatically as records change
- › Free up time for higher level tasks
- › Use business processes to automate data entry or customize forms to match your process

Configurable Workflows

Process: Award Notification

Information

Customization

Process Settings

Workflow Job Retention

Check grant amount

Send email

Fill in data notified

Stop workflow with status of succeeded

Powerful Reporting and Data Analytics

- › Use built-in reports and dashboards to easily evaluate programs, allocations, grant history and grants payable, organizational history, and more
- › Drill down to see record detail from reports, charts, and graphs
- › See the data as you like it with reusable personal or public data views
- › Find the data you need with user-friendly filtering and searching
- › Create and modify reports using the intuitive report wizard
- › Link or export to Excel to create dynamic or static worksheets, tables and interactive charts and graphs
- › Output to XML, PDF, CSV, Excel, Word, MHGML, TIFF and other formats



Comprehensive Fund Accounting



In partnership with Intacct, 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), it also addresses the unique needs of a community foundation, including:

- › Joint Investment Allocation
- › Fund Fee Assessment
- › Spendable Allotment
- › Fund Auto-balancing
- › Customizable financial reporting and dashboards

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Dynamic Fund Management

- › Manage fund creation, purpose and requirements
- › View contribution and grant history
- › Relate all involved parties; advisors, investors, report recipients, beneficiaries
- › Connect fund interests with grant opportunities
- › Pay grants from one or more funds
- › Automatically create online donor statements with Fundweb.net (Optional)

Streamlined Fund Tracking

The screenshot displays the Microsoft Dynamics CRM interface for a fund record. The top navigation bar includes 'Microsoft Dynamics CRM', 'FUND ACCOUNTING', and 'Funds | 003'. The main content area is divided into several sections:

- FUND 003**: Overview section showing Fund Code (003), Fund Name (Cystic Fibrosis Foundation Building P), Primary Fund Contact (Annie Labrith), Fund Type (Special Project), Endowed (No), and Fund Anonymity (Anonymous for publications).
- Fund Contact**: Details for Annie Labrith, including First Name, Last Name, Email Address (annie@montanatenants.net), Mobile Phone, and Company (Montana Tenants Ne).
- Fund Detail**: A table with columns for Fund Class, Fund Instrument, Fund Purpose, Succession Plan, Status Reason, Currency, Created By, Created On, Modified By, and Modified On. The Fund Purpose is 'To build a new building for the local CIF chapter.'

The screenshot displays the 'Activity' section for Fund 003, featuring two tables:

Gift Payments by Fund				
Gift No.	Donor	Posting Date	Amount	Post
0005	Energy Alternatives	1/15/2014	\$2,500.00	Pending
0005	Energy Alternatives	6/18/2014	\$2,500.00	Pending
0005	Energy Alternatives	9/15/2014	\$2,500.00	Pending
0004	Barry Redford	9/26/2014	\$50.00	Pending

Request Payments by Fund				
Request	Payee	Amount	Posting Date	Post
0005	American Swedish Institute	\$9,000.00	7/31/2014	
0005	American Swedish Institute	\$6,000.00	4/30/2014	Go



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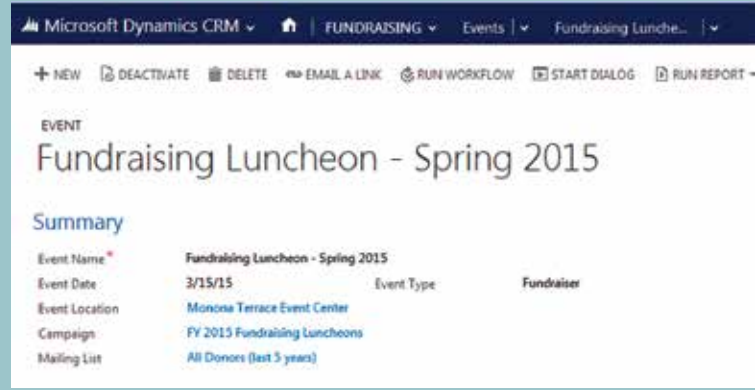
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Fundraising: Prospect and Donor Development

- › Maintain donor and prospect records in one location; monitor activity, schedule meetings, and review important donor facts
- › Easily convert prospects to donors
- › View comprehensive gift history, easily see details on any gift
- › Connect important constituent demographics: partners, staff assistant, financial advisors, family, priorities, interests
- › Match donor interests with grantmaking opportunities
- › Track campaigns and appeals, analyze success and return on investment
- › Track event details, including attendance lists, and fair market value for goods received

Integrated Event Tracking



Gift and Pledge Processing

- › Monitor the entire gift process: Commitment, pledge reminders, payments, acknowledgements
- › Process matching gifts and challenge grants
- › Track memorial and honorary gifts, including acknowledgement recipients
- › Generate acknowledgements automatically
- › Process stock, in-kind gifts and other non-cash contributions
- › Integrated with Community Akoya.net Fund Accounting

Complete Gift/Pledge Processing

