

Foundation Management Software for Corporate Foundations & Giving Programs



Corporate Akoya.net harnesses the power of Microsoft Dynamics CRM to bring you a fully integrated solution tailored to the needs of corporate giving programs. Contact tracking/CRM, grant management, volunteer tracking, and event 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 management, volunteer tracking, and event 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 customers: 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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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

CONSTITUENT Asian Youth Outreach, Inc

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

CONTACTS

General Email: info@asianyouthoutreach.org
 Primary Contact: Deborah Fong
 Email Address: dfong@asianyouthoutreach.org
 Business: 888-555-1212

| Full Name | Job Title |
|--------------|-----------------------|
| Deborah Fong | Director |
| Grace Taylor | Program Administrator |

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

CONSTITUENT Asian Youth Outreach, Inc

Primary Contact: Deborah Fong | Tax ID: 84-1553945 | Service Area: Greater Metro | Total Grants: \$20,000.00

Request Associated View

+ ADD NEW REQUEST | BULK DELETE | CHART NAME | RUN REPORT | EXPORT REQUESTS

| 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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Track Volunteers & Events

- › Track employee volunteer hours and corporate sponsored volunteer events
- › Manage event details: location, attire, invitees/attendees, table number, dietary restrictions, and more
- › Associate and monitor related campaigns and planning activities

The screenshot shows the 'EVENT' page for 'Bromelkamp Company Gives Back'. It includes fields for Event Name, Date (7/15/16), Location (Leopold Elementary School), and Event Type (Volunteering). A description states: 'A day of sorting school supplies and stuffing backpacks for students in need at Aldo Leopold Elementary School'. The 'INVITATIONS' section shows 6/1/2016 as the date sent, with 2 accepted and 0 declined. The 'VOLUNTEER SUMMARY' shows 2 Employee Volunteers (6.00 hours) and 1 Non-Employee Volunteer (4.00 hours). The 'Attendees' table lists Henry Bromelkamp and Kate Clark as active attendees.

| Attendee Contact | ADVP | Name/Tag | Table Number | Attended? | Event | Attendee # |
|------------------|------|----------|--------------|-----------|-------------------------------|------------|
| Henry Bromelkamp | Yes | Henry | | Yes | Bromelkamp Company Gives Back | |
| Kate Clark | Yes | Kate | | Yes | Bromelkamp Company Gives Back | |

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 shows a 'REQUEST' page for request number 00049. The status is 'Approved' with a decision date of 2/15/2017 and a requested amount of \$55,000.00. A workflow diagram shows stages: Letter Of Intent, Application (Active), and Payment. The 'Summary' section includes details for Brian Waters, ABC Foundation, 2017 Operating Support, and a requested amount of \$55,000.00. An activity log shows an email from Akoya Tester regarding the grant award.

| Request # | 00049 |
|---------------------|----------------|
| Submission Accepted | Yes |
| Full Name | Brian Waters |
| File # | -- |
| Method of Contact | Any |
| Email | Brian@MCCastng |
| Business Phone | -- |



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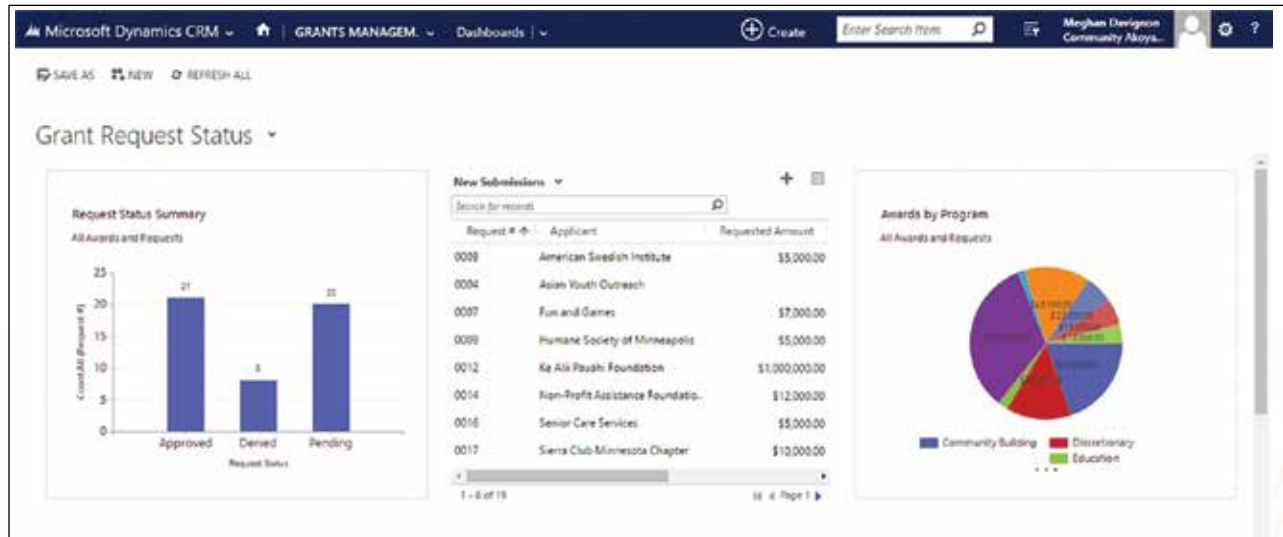


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Powerful Reporting and Data Analytics

- › 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



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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