



# Advanced CRM & Analytics for Nonprofits

**Convio Luminare™ 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, Luminare CRM gives your organization a complete view of your constituent relationships and powerful analytical capabilities

to support direct response and business intelligence.

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

The Leading CRM Platform  
+ Powerful Data Analytics  
Customized for Nonprofits

GAME-CHANGING  
INNOVATION  
THAT DRIVES RESULTS

## COMPLETE RELATIONSHIP MANAGEMENT & ANALYTICS FOR NONPROFITS

Luminare 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. Luminare 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, Luminare CRM is designed specifically for nonprofits with an enterprise-scale underlying infrastructure.

- **Get the answers you always wanted, now.**

Luminare CRM includes a sophisticated data warehouse which enables analytical capabilities and business intelligence not available in any other nonprofit solution.

- **Rest easy knowing your data is secure.**

Bank-grade security with automatic backups with available field-level auditing for additional tracking.

- **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 and interaction data in one place. Link contacts to households and organizations and define relationship types to create a complete profile of all of your supporters. Track all interactions—whether one-to-one, or from large multi-channel direct response campaigns.

- **Correspondence Tracking**

Link all communications through every channel to each individual record for tracking and segmentation.

- **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.

- **Multiple Address Tracking**

Store seasonal or alternate addresses and keep track of all address changes for rollback or deduplication.

- **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 & Lotus Notes® 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.

The screenshot displays a web browser window with the Convio CRM interface. The main heading is "Joseph Palmer \$500000.00 Pledge Installment 3 of 5". Below this, there are several tabs: "Get Assets", "Open Activities", "Activity History", "Show History", "Reverses Designations", and "Notes & Attachments". The "Donation Detail" section is expanded, showing the following information:

Donation Name	Joseph Palmer \$500000.00 Pledge Installment 3 of 5	Donation Record Type	Pledge Installment (Change)
Account Name	Joseph Palmer Household	Type	Individual Gift
Donor	Joseph Palmer	Transaction Type	
Donation Owner	Lincoln Means (Change)	Primary Classification	Board Member
Amount	\$100,000.00	Probability (%)	70%
Benefit Value	\$0.00	Donation Series Description	Occurs yearly on January 1 effective 10/2012
Tax Deductible Amount	\$100,000.00	Labels	
Class Date	1/1/2012		
Stage	Pending Installment		
Primary Campaign Source	2010 Chicago Data Campaign		
Segment Code			
Pledge	Joseph Palmer \$500000.00 Pledge		
Record ID	DCN11219		
Description			

Custom Pledge Scheduling to Meet Donors' Needs

- **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.

- **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**

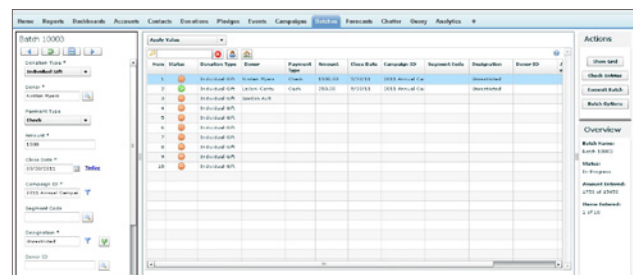
Track memorial and honor gift notifications, personal messages and donor preferences.

- **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.



Batch gift entry makes creating gifts simple.

## RELATIONSHIP MANAGEMENT

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

- **Relationship Tracking & Search**

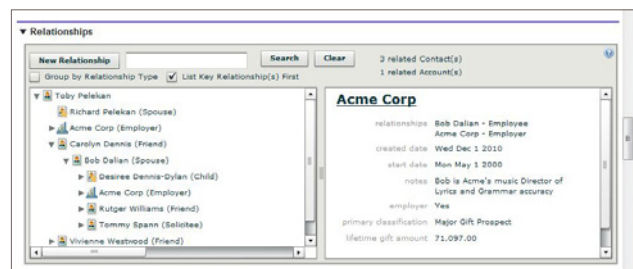
Query an individual contact for known relationships, or search the entire database for contacts with a specific type of relationship.

- **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.



Relationship tracking helps build more valuable relationships with key constituents.

## DIRECT MARKETING

Structure, segment and analyze your multi-part campaigns for direct mail or other marketing efforts with Luminare CRM. Manage your campaigns in-house, or enlist Convio 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 Lists Views**

Organize campaigns into sortable lists for individual or cross-team access to quickly find campaigns or compare results.

- **Query & List Builder**

Quickly build lists and export for use in targeted communications. Counts update as you update your criteria.

- **Segment Codes for Quick Data Entry**

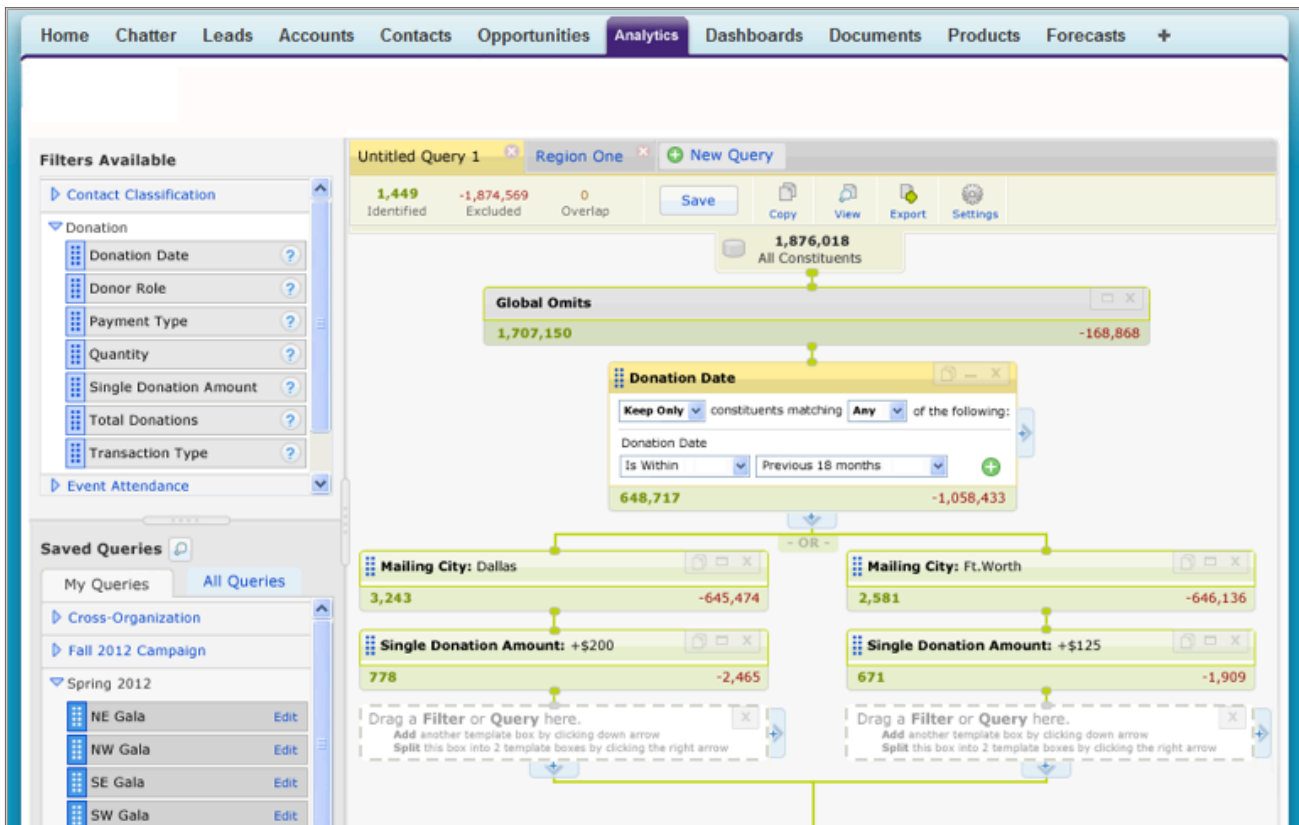
Customize the types of relationships available to associate with individuals or organizations.

- **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.

- **Detailed Activity Tracking**

Keep detailed logs of all related tasks, email correspondence, attachments, notes and project details for every campaign.



*Drag-and-drop list builder gives you campaign select counts in minutes instead of weeks or hours—and without impacting other processes.*

## 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 home pages 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**

Analytics data warehouse gives you the full picture of constituent interaction, with predefined reports, an ad hoc report designer, and complex dashboard builder.



Users can easily create custom dashboards to meet their unique needs.

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## 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.

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## 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.

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## 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**

Auto-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.

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## 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 Excel or CSV with two clicks.

- **Scheduled Bulk Export**

Automatically export a snapshot of your data on a scheduled basis.

- **Enterprise Web Services API**

Integrate Luminate CRM with other applications to expose every data object and field in the database.

- **Microsoft Outlook & Lotus Notes Integration**

Use Luminate CRM 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.

- **AppExchange® Marketplace**

Browse, click and integrate more than 1000 applications that have been built to integrate with the Force.com platform.

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## SUPPORT FOR AFFILIATE & CHAPTER-BASED ORGANIZATIONS

Luminate offers MultiCenter capabilities for organizations with multiple business units, including chapters, affiliates, separate 501c3 and 501c4 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.

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## STRATEGIC SERVICES

### Let Us Help You Reach Your Constituent Engagement 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 Convio 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, Convio offers creative services including graphic design, information architecture, website analysis and interactive / multi-media projects.



# Convio Luminate CRM + Luminate Online

## **Integration with Luminate Online**

The Convio Luminate architecture for Constituent Engagement includes seamless integration to Luminate Online. Data automatically and continuously flows between the two systems for more powerful, truly integrated multi-channel campaign capabilities.

Use Luminate Online to fully coordinate your multi-channel constituent engagement activities:

- Acquire, renew and upgrade donors online.
- Affect public policy by engaging your activists in message campaigns at the national, state and local level, or by sending Letter to the Editor messages using Advocacy.
- Grow peer to peer fundraising through honor, memorial, and virtual campaigns using Personal Fundraising.
- Manage large-scale participant events such as walks and races using TeamRaiser™.
- Recruit volunteers using sign up forms you design.
- Allow all of your sustaining donors using an automatic payment option to manage their sustaining gifts through the Service Center.
- Sell real and virtual products through the Shopping Cart.
- Collect RSVPs and sell tickets to events through the Calendar.

Learn More: [www.convio.com/luminate](http://www.convio.com/luminate)



## ABOUT CONVIO

Convio is a leading provider of on-demand constituent engagement solutions that enable nonprofit organizations to maximize the value of every relationship. With Convio constituent engagement solutions, nonprofits can more effectively raise funds, advocate for change and cultivate relationships with donors, activists, volunteers, event participants, alumni and other constituents. Convio offers two open, cloud-based constituent engagement solutions: Convio Common Ground CRM™ for small- and mid-sized nonprofits and Convio Luminate™ for enterprise nonprofits. Headquartered in Austin, Texas with offices across the United States and United Kingdom, Convio serves more than 1,500 nonprofit organizations globally. Convio is listed on the NASDAQ Global Market under the symbol CNVO. For more information visit [www.convio.com](http://www.convio.com).

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