

## Cloud Engage

### Supercharge your fundraising potential with our Cloud-based Customer Relationship Management solution, designed for small-medium sized charities.

In the digital age, charities are under increasing pressure to ensure that they communicate with donors efficiently and effectively in order to continue to grow fundraising revenue. This is coupled with the challenge of having flexible and scalable technology so you can provide staff with the tools to streamline administration tasks, allowing them to invest more time in the people that matter – your donors.

That's why we've developed Cloud Engage – an intuitive Customer Relationship Management (CRM) system designed with charities in mind. It enables you to build effective marketing campaigns, process fundraising income, manage merchandising and Gift Aid and provide your teams with the ability to process tasks with ease anytime, anywhere; using the latest in Cloud technology.

#### **Simple, unified view of your charity's performance**

Cloud Engage incorporates all elements of fundraising management and CRM into one flexible and scalable solution so your teams have one complete, real-time view of your charity's performance. Having all fundraising data in one place not only means you can analyse the success of campaigns and fundraising, but staff are able to find information in one central area – as opposed to using multiple systems. The system integrates with portals for both your staff and your donors, meaning information is pulled from different sources into one unified view.

#### **Smarter way of working**

With commercial organisations moving to the Cloud, there is no reason why charities shouldn't adopt smarter ways of working too. Using Cloud storage makes sense in order to grow your revenue and adopt flexible working. All of the IT support relating to your donor database can be moved out of your office, so you don't have to worry about it – this is especially important now with the focus on the security of personal data in GDPR.

# Fundraising management in the Cloud



## **Anytime, anywhere**

One of the key advantages of using a Cloud-based solution is the ability to work on multiple devices, no matter where you are. Fundraisers are able to access key CRM and event modules on the move, giving them the opportunity to add and access donor data with ease, using their laptop, tablet or phone.

## **Grow your charity**

We know that our customers will want to continue to develop their charity which is why Cloud Engage is designed to be scalable to grow alongside you. You can expand into new revenue streams such as different types of events, major donors, memberships or other committed giving schemes – it's all possible with Cloud Engage. Using digital and mobile tools which are flexible to your charity's growth means the sky is the limit – and you don't have to worry about changing solution once you become more successful.

## **Low cost**

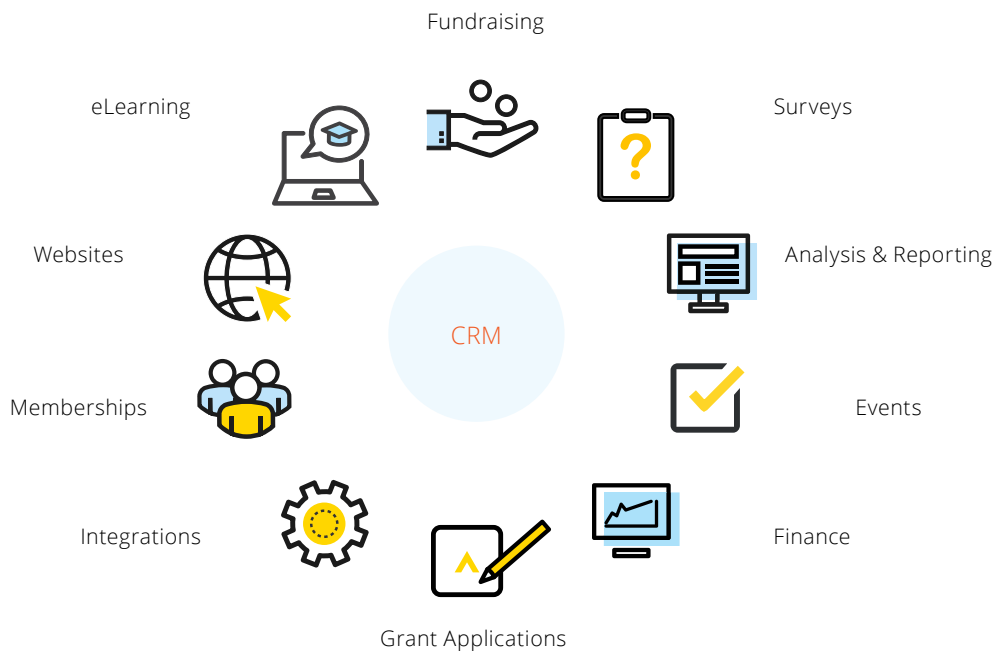
Using a Software as a Service (SaaS) application means you won't have to pay any hefty up-front fees, as your solution is paid for on a per user per month basis. We know that for smaller and mid-sized charities, finding large funds to pay for technology is not always an option. By adopting this pricing model, it makes having the latest functionality realistic and puts you in a position to use tools which will bring you closer to your donors.

## **Accessible and secure**

Using the Cloud means your donors' data and fundraising income is safer than ever before, with no information stored on a physical hard drive. This puts you at less risk of losing important data. Our Tier 3 data centres are ISO 27001 accredited and offer the highest level of security for your solution.

In the digital age, having a solution which doesn't accommodate mobile ways of working is inefficient. By implementing a Cloud solution, you can be brought closer to your donors by engaging with them more effectively than ever before. The tools available through using Cloud Engage provide your staff with a simple, flexible, mobile solution; increasing overall efficiencies and streamlining processes, giving you more time to focus on the people that matter.

# Cloud Engage Functionality



Cloud Engage has a full range of functionality to help you manage your donors and other stakeholders.

## Contact Management

- > See all your donor data in one place
- > Easily navigate complex family and business relationships
- > Ensure GDPR compliance
- > Simple and complex queries to manage groups of donors
- > In-built action manager

## Fundraising

- > Ad hoc and regular giving
- > With access to Advanced Gift Aid Portal to HMRC
- > Restricted and general income
- > Close integration to website
- > Soft credits
- > Range of payment methods including direct debits and payment cards

## Events

- > Single or multi-session
- > Manage a wide range of event types – challenges, dinner, awards, training

- > Book singly or in groups
- > Support upsell and cross-sell

## Integration

- > Automated Nominal Ledger update
- > Integration to Advanced Exchequer
- > Import from Just Giving and other payment platforms
- > Send emails via bulk email platform
- > PAF lookup and DD modulus checking

## Marketing

- > Create multi-tier campaigns
- > Track success by channel and segment
- > Analyse by department and type
- > Supports both ongoing and capital campaigns
- > Segmented selections

## Membership

- > Individual, joint and group membership
- > Rolling or fixed date renewals
- > Flexible reminder cycles
- > Cash or invoices using in-built Sales Ledger

# Cloud Engage

## Cloud Engage Portal

Cloud Engage delivers access to key areas of the system for donors and members through the Cloud Engage Portal. As an online portal connected to your website it serves as a link to the main system and is deeply integrated into the Cloud Engage system used by staff and volunteers.

### Contact Management

- > Donors and members can update personal details and contact preferences
- > Register for updates
- > Access on any device

### Events

- > Donors and members can browse events to see what is coming by type and by region
- > Book to attend events

The Cloud Engage Portal is seamlessly integrated into your website so you can easily make the following features available to your donors and members, with all data coming securely into your Cloud Engage database;

### Donations and Memberships

- > Make one-off and regular donations
- > Join membership schemes online
- > Share pages to social media to encourage friends

### Other features

- > Register for online newsletters
- > Access to surveys – all answers go back to the CRM
- > Submit online enquiries
- > Access to document downloads

## More information

**w** [oneadvanced.com](http://oneadvanced.com)  
**t** +44(0) 8451 605 555  
**e** [hello@oneadvanced.com](mailto:hello@oneadvanced.com)

Ditton Park, Riding Court Road, Datchet, SL3 9LL

Advanced Computer Software Group Limited is a company registered in England and Wales under company number 05965280, whose registered office is Ditton Park, Riding Court Road, Datchet, SL3 9LL. A full list of its trading subsidiaries is available at [www.oneadvanced.com/legal-privacy](http://www.oneadvanced.com/legal-privacy).

## A modular approach

At Advanced we recognise that whilst charities have common themes of requirement in a CRM solution, each charity has its own specific variances on these requirements. For that reason, Cloud Engage has been designed using a modular approach. The solution has extensive and powerful functionality but it's up to each of our clients to choose which elements they utilise. This choice is represented in our pricing structure, clients can choose our Essentials option or the Enterprise version.

## Beyond donor management

Cloud Engage is just one aspect of our product portfolio. From HR and payroll to finance and reporting we offer an extensive range of back office and organisational tools designed to simplify your working practices.

