Donor Strategy, our Customer Relationship Management (CRM) and fundraising system

Donor Strategy is a web integrated CRM and fundraising system for small and medium-sized charities, used by over 300 organisations.

Donor Strategy is a CRM database with specific modules activated to meet your needs. This way we deliver a system that is tailored to match the way you work. Modules are activated as your needs change over time, ensuring a future proof solution.

The central CRM database will deliver a single view of your supporters, whilst also enabling you to profile and develop relationships with people and organisations. Comprehensive records include contact history, relationships to your organisation and links to other supporters.

Web Connect

Web Connect is our online community for donors, friends, members and alumni, designed to blend in with your own website.

Flexible, cutting edge technology securely links your data directly to the Internet to create web communities, discussion forums or accept online donations. Interact with your supporters and allow them to self serve.

> Maintain their own contact details

> Subscribe to newsletters

> Make online donations

> Read news online

> Download content

> Find friends

> Book on to events

> Buy tickets

> Purchase merchandise

> Engage in career networking

> Participate in moderated

> discussion forums

> Complete simple online forms

> View content based on set

> access levels

> Join and renew membership schemes

With over 1,000 not-for-profit organisations as our customers, we are the leading provider of software and services to the UK Not-For-Profit sector.

FACT SHEET

Donor Strategy

Donor Strategy can be integrated with Exchequer NFP Edition.

This provides complete support to maintain tight financial control. User-friendly and reliable, Exchequer NFP Edition covers much more than core accounting ledgers or cost centre and departmental budgeting.

The software provides powerful in-depth reporting and analysis throughout the fully integrated suite, which includes...

> General Ledger - a flexible, hierarchical structure with independent cost centres and department codes, allowing for powerful analysis

> General Ledger Views - configure up to 999 different views of the General Ledger data to present vital information about an organisation tailored to the users' needs

> Cashbook - a detailed record of cash receipts and expenditures

> Sales & Purchase Ledgers - managing all transactional activity, from simple petty cash journals to multi-currency reconciliations

> eBanking - the facility to send payments via your bank's software online, as well as download and reconcile bank statements

Donor Strategy is available in a hosted environment

With our recommended hosted solution we would install your Donor Strategy database on a high specification server at a secure data centre.

You simply access your database through the Internet, rather than via your network. The advantages include...

> Latest firewall and anti-virus technologies to protect your data

> Easier and more secure remote working - with live updates

> Simpler for us to access, upgrade and maintain Donor Strategy for you

> Enhanced integration with Web Connect, securely linking your data to the Internet

> Less investment and reliance on your IT infrastructure and IT team

> Clearer accountability for the performance of your systems

> Back ups are outsourced to help with Data Protection and security

> Help future-proof your organisation

> Overall cost savings: reduced waste and improved efficiency

Listening to your needs

User groups and forums are actively involved in our software development, all of which is handled by our team in the UK.

Where there are statutory compliance changes you can be sure that Advanced NFP will be a step ahead to provide you with the most up to date software to meet your needs, with all product upgrades included as standard.

Our software and services have evolved according to the needs of our diverse client base over many years, which accounts for our ability to offer extensive, polished features tailored for multiple NFP segments - charities, education, arts and more.

With 30 years of experience and over 120 specialist staff in the UK dedicated to servicing the needs of the not-for-profit sector, we pride ourself on a tailored approach to customer service, with an emphasis on reliability and personal relationships, evidenced by our 95% annual customer retention, amongst the highest in our industry.

More information

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