

Functionality List for DPO and Alumni Portal (and other optional services)

Donor/Alumni Management

- Enter new constituent (& associated detail)
 - Create relationships (links) & link constituents (i.e., head of household, parent-child, fellow bunkmates, etc.)
- Incorporate wealthengine.com details for existing constituent (if we go down this path)
- Multiple addresses (i.e., seasonal)

Contact Management

- Prepare mailing through Constant Contact; includes creating list of recipients and preparing text/pictures in email
- Prepare email merge in DPO
- Manage contact/solicitations (i.e., track contact with constituent)
 - "Open Contacts" on dashboard for reminders (based on DPO logins)

Gift/Pledge Management

- Input pledge
 - Various payment schedules (including unusual schedules)
 - Pledge reminders can be initiated in Pledge Processing in DPO
- Process gift
 - Process gift – full payment
 - Process partial gift
 - Process gift – payment for pledge
 - Soft credits
 - Memorials and Honorariums
 - Split Gifts
- Track planned gifts/legacy
 - Bequests
 - Gift annuities
 - Etc.
- Process memorials
- Track campaign
 - Enter new fund code
- Prepare thank you's (acknowledgements)
 - Various Thank You Letter Templates can be prepared and referenced in DPO

Alumni Portal Maintenance

- Process new Alumni registration in AP/DPO (info cascades into DPO)

- One-by-one
- Batch; note that individual registrations should still be checked for accuracy
- Process updated Alumni information in DPO
 - Receive email notification
- Monitor messageboard
- Process online gift from AP (through DPO)
- Create new alumni event registration form
 - Process new alumni event registration

Reporting

- Reports
 - Canned
 - Custom Report Writer

Other DPO Functionality

- Define custom fields
- Code Maintenance (Drop-down values)
- Dashboard functionality – User-defined reports, Open Contacts, Donor/Gift Listings, News and Links (DPO)
- Duplicate Maintenance
- Import data

End-User functionality (AP)

- Go to AP as first time alumni registering
- Go to AP to login for first time
 - Enter/edit required information
- Go to AP to login subsequent times
 - Enter/edit information
- Upload Photos
- Refer-a-Friend
- Post/view events on Calendar
- Post Message on Messageboard
- Search Alumni Directory
- Donate Online
- Register for Event