

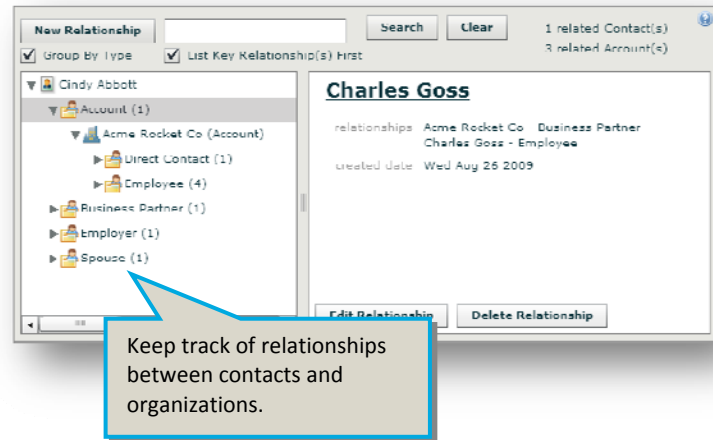
# COMMON GROUND CRM™

The CRM solution for nonprofits, built 100% on Force.com

[Constituent & Relationship Management](#) | [Donation Management](#) | [Event & Volunteer Management](#)

Convio Common Ground is a Constituent Relationship Management (CRM) system built for nonprofit organizations. By adding features and functionality to a standard Salesforce installation, we're delivering unparalleled innovation for your nonprofit.

Both Convio and Salesforce engineering teams deliver three major releases of new and improved functionality every year; no competing solution matches this level of product investment. So, as Convio and Salesforce enhance their products, your nonprofit receives all of the improvements.



## KEY FEATURES

Common Ground delivers key donor and constituent management features, volunteer tracking, and event management — giving you a single system for managing all of your organization's relationships. Here's just a sampling of features from the 10,000+ hours Convio has invested in building Common Ground:

### Constituent and Relationship Management

Common Ground tailors the way Salesforce manages Contacts and Accounts to work the way nonprofits work. The result is a practical and intuitive product for managing all types of relationships without sacrificing your ability to make customizations or take advantage of products from the Salesforce AppExchange.

#### Contacts and Accounts

- Automatic householding
- Giving summary calculations
- Mailing address synchronization
- Related and historical addresses
- CASS address standardization

#### Duplicate Management

- Identify by specific field values or use complex match keys
- Combine values from multiple contacts across multiple households
- Retain all related information from merged contacts

### Event and Volunteer Management

Common Ground is more than just a donor database. It helps nonprofits manage volunteer activities and fundraising events — everything from annual galas to golf tournaments.

#### Volunteer Features

- Track volunteer jobs with multiple shifts and individual availability and skills
- Track and report on participation
- Find available and qualified volunteers
- Manage shift registrations and attendance

#### Event Features

- Detailed event information
- Multiple attendee and sponsorship levels
- Expense and in-kind gift tracking
- Integrated mail merge
- Event check-in manager

### Pre-Loaded Common Ground Reports

Common Ground provides more than 100 standard reports for analyzing your constituents, fundraising, events, volunteers, and more. Every report can be copied and customized to meet your organization's needs.

## Donation Management

Using the Opportunity object in Salesforce, Common Ground adds tools and objects that help nonprofits capture gifts of all types — providing the results and features you expect from a robust donor database product.

### Tracking Gifts

- Tracking and support for all gift types
- Split gift designations
- Soft credits
- Matching gifts
- Receipts and acknowledgements
- Bulk mail merge

### Batch Gift Entry

- Custom gift entry layouts
- Quick defaults
- Data entry validation
- Save and return or commit
- Quick lookup via ID
- Close and reuse

### Pledge and Recurring Gifts

- Custom pledge payment schedules
- Auto-calculated summary values
- Inherited honor/memorial details
- Capture major gifts as pledges

### Tracking Grants

- Capture important grantor details
- Manage grant application tasks
- Monitor grants by stage
- Report on progress

**Payment Schedule**

Weekly  
 Monthly  
 Quarterly  
 Yearly

On day **5** of every **2** month(s)  
 On the **1st** day of every **1** month(s)

Payment Preview

Payment Name	Date	Amount
Jennifer Generous \$2400.00 Pledge Installment 1 of 12	Thu Feb 12 2009	\$200.00
Jennifer Generous \$2400.00 Pledge Installment 2 of 12	Sun Apr 5 2009	\$200.00
Jennifer Generous \$2400.00 Pledge Installment 3 of 12	Fri Jun 5 2009	\$200.00
Jennifer Generous \$2400.00 Pledge		
Jennifer Generous \$2400.00 Pledge		
Jennifer Generous \$2400.00 Pledge		

Close Date: 12-16-2008

Apply to Selected Apply to All

3 Entries Valid of 10 \$180.00 Entered of \$3000.00

Num	Status	Donation Type	Donor	Amount	Designation	Acknowledged	Close Date	Campa
1	✓	Individual Gift	Frankie Adams	90.00	Education	Not Acknowledged	12-17-2008	2008 A
2	✓	Individual Gift	Tommy Spann	50.00	Education	Not Acknowledged	12-17-2008	2008 W
3	✓	Individual Gift	Iona Hall	100.00	Education	Not Acknowledged	12-17-2008	Outrea
4	✗	Individual Gift	- Select Donor -		Education		12-15-2008	Outrea
5	✗	Individual Gift	- Select Donor -		Education		12-15-2008	Outrea
6	✗	Individual Gift	- Select Donor -		Education		12-15-2008	Outrea
7	✗	Individual Gift	- Select Donor -		Education		12-15-2008	Outrea
8	✗	Individual Gift	- Select Donor -		Education		12-16-2008	2008 W
9	✗	Individual Gift	- Select Donor -		Education		12-16-2008	2008 W
10	✗	Individual Gift	- Select Donor -		Education		12-16-2008	2008 A

Save Check Entries Commit 7 entries not ready to be committed Return to Batch

## ABOUT CONVIO

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit [www.convio.com](http://www.convio.com).

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