

## Flexible, configurable, all-inclusive solution

Built on the Microsoft platform, a fully customized software solution designed to optimize efficiencies and maximize impact.



All-inclusive end-to-end solution, from relationship management to fund accounting.

#### **FLEXIBLE**

Fully configurable technology to accommodate unique needs of your foundation.

#### > AUTOMATED

Streamline day-to-day operations through automation, minimizing touchpoints and processes.

#### ACCESSIBLE

Cloud-based platform provides access, anytime and anywhere.

#### **FEATURES AND BENEFITS**

Donor Segmentation and Development = Improve Fundraising Automated Grantmaking = Increased Efficiency Robust CRM = Manage Relationships Comprehensive Fund Accounting = Compliance and Accuracy Microsoft Dynamics 365 = Data Security

With more than 40 years serving grantmakers, our mission remains the same...to support foundations and power philanthropy, making it better along the way.



### Integrated end-to-end software solution

Completely configurable to accommodate the unique needs of your foundation. Designed to streamline day-to-day operations through automation to minimize touchpoints and processes, this cloud-based platform provides access anytime and anywhere.

### **GO** apply

- Easy to build application process
- Provides applicant dashboards and two-way communication user interface
- Seamless CRM integration eliminating manual data entry
- Customizable interface for individual brand needs

## **co**verify

- Automated and accurate 501(c)3 verification utilizing Publication 78
- Automatically creates and stores verification documentation

### **co**donate

- Integrated donation process automatically interfaces with website to manage online donations
- Easily share news of donations on social media for causes and events

# cofund

- Provides up-to-date online fund statements
- Effortless ability to share giving activity with fellow funders
- Ability to make donor-advised grantmaking from anywhere

#### **GO**pay

• Clearinghouse service prints and mails both checks and letters to grantees

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