

Flexible, configurable, all-inclusive solution

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

INTEGRATED

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

AUTOMATED

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

FLEXIBLE

Fully configurable technology to accommodate unique needs of your foundation.

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.

coapply

- 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

codonate

- 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