

# EPRÍSA CRM

CRM solutions designed to your specifications

## Why Eprisa is different

Users access the application via a web browser over a secured internet connection. Eprisa© runs on a state-of-the-art OODB (Object Oriented Data Base). Saturn's technical staff handles development, maintenance and support of the application software, along with the backup and recovery, resource management and performance tuning tasks necessary to ensure optimum application responsiveness and availability. Saturn provides a 'tailor-made suit' based on your specifications, nomenclature, and business rules. Competitively priced, budgeting is simple because of Saturn's flat-rate monthly pricing. Everything is included in that one price: Conversion, Hosting, Maintenance, Tech Support, Upgrades, and Development.

## SAS 70

Saturn is SAS 70 compliant.



We all recognize the importance of building strong relationships with our customers. In many cases, the strength of your relationships can determine how successful your business is. In Fundraising you need to keep in touch with supporters, analyze your best prospects, develop online communities, and let supporters know you appreciate them, and with a powerful CRM at the heart of your fundraising activity this can easily be achieved.

Saturn Corporation's very own cloud based Customer Relationship Management (CRM) solution – Eprisa will help you cultivate lifelong relationships, streamline processes and help your organization retain all important donors.

When considering a CRM strategy, your needs will vary depending on the size and complexity of your organization, Eprisa is scalable, is cloud based therefore does not need any local technical infrastructure and being cloud based can be accessed by any authorized user anywhere in the field giving your users up to the second streamed data.

## Saturn's Features / Benefits

- Custom CRM/Database Solutions to your Business Rules, Nomenclature, and Specifications
- Integrates into any 3rd party software
- Simple to Understand Pricing
- No hardware or software investment necessary
- All upgrades included - no more tech support nightmares
- Perfect for Organizations with Multiple Chapters, Regional Offices, International Offices, and Affiliate Databases
- 24/7 access to your data anywhere in the world via secure Internet connection
- User defined reports that are scheduled or initiated in real-time
- Conversion is simple, fast, and painless - no conversion fees
- Email marketing services
- Available in any language
- Backend services available - Batch, Cage, Data Entry, House Mailings, Merge/Purge

## Plug in your custom need

The Eprisa platform is able to interface with 3rd party applications using any of the popular integration technologies

Our Partners and our Customers tell us that Eprisa is the most functionality rich CRM software, completely flexible and intuitive making it easy to use and easy to train. However at every step of your journey with Saturn, our Account Managers are on hand to guide, advice and to help with your training program ensuring that your decision to invest in Saturn is the right one.

Donor Management, Events Management, Major Gifts, Legacy Gifts, VOIP and our powerful Business Intelligence Tool, believe it or not, are standard modules within Eprisa. Every module is parameterized and enabled from the out set however being modularized we can deliver only the modules you need to personalize the user experience and to keep things as simple as possible in a system packed with functionality.

Now who would have imagined you could get a modularized system – all enabled for a non modularized price tag – with Saturn you can.

Saturn has provided world-class software solutions since 1981. Saturn's Eprisa© CRM (Constituent Relationship Management) system operates on the SaaS (Software-as-a-Service) model. All application software and client data is hosted on Saturn's servers. Eprisa© is a customizable platform that allows companies to view their data across the organization in real-time. Gone are the days where separate silos of legacy systems prevent you from having access to your data. Safe and secure, Eprisa© enables you to have a central data repository connected to any area: Development, Membership, Finance, Mobile, Social Networking, Events Planning, Inventory Management, etc.

## Eprisa Details

### Centralized Data Repository

Eprisa functions as a flexible “framework”, tailored to each customer's business rules and processes. Specific modules can be enabled/disabled by client. The Constituent record is positioned as the “hub”, and all other forms of engagement are linked back to the Constuent.

## Fundraising

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Pledges may be “Recurring Open-Ended”, “Fixed Term”, “Installment” or “One-Time Promise”.

Processing and posting of direct debit and credit card payments is totally automated.

Flexible Campaign Selection tool supports sophisticated segmentation strategies for house appeals.

“Finder Number” processing reduces data entry effort for prospect responses.

Integrated Postal Address lookup and validation reduces undeliverable mail.

Potential duplicates are detected and reconciled at point of entry.

No limits on the number of Persons, Postal and Email Addresses, Phone Numbers, Contacts, Comments, Tasks, linked to each Constituent.

Multi-phased acknowledgement and Premium Fulfillment, at your place or ours (or your mail shop).

Flexible Attribute system for segmenting Constituents by interest, engagement, preferences, etc.

Custom “client triggers” means Eprisa is tailored to each client’s needs and enforces

Full suite of management reports

## Major Gifts

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System supports Solicitor, Prospect assignment, Moves Management® and customer-defined pipeline s.

Progress is tracked by Proposal, not Constituent, so multiple (even concurrent) proposals for a given

Constituent are supported. Major Gift Officers (MGO’s) may be organized into Teams and Attributes,

Contacts, Tasks and Comments can be made “private”; visible only to an MGO or Team. Eprisa currently

supports attaching any number of electronic files (doc, spreadsheet, image, etc.) to a Constituent record.

This facility to be enhanced so that files may also be attached to proposals, gifts, pledges, contacts, tasks, etc.

## Events Planning

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We are integrating Cvent into Eprisa, the market leader in web-based events management. Saturn will create “live links” between the CRM database and Cvent applications to share relevant information, such as whenever a constituent is invited, registers (or declines), pays and attends an event. Cvent also offers survey and email campaigns, also to be integrated with Eprisa.

## Online/Web

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Eprisa is provided as a web application, this means all you need to connect to your data is a modern browser and an internet connect. There is no software to install, back-up, upgrade or maintain at your location.

Saturn can also create and maintain your organization’s web site, or integrate with your existing site to accept online donations, provide donor access, etc.

## Business Intelligence

Eprisa’s Reports Menu offers a full suite of pre-programmed reports. Each supports run-time filters and options; along with the ability to export results to Excel, PDF, CSV or Word files. Many can be displayed as a graph or chart. All require only a few clicks to execute and run “live” against the production database.

For those who want to dive deeper into their CRM data, Saturn offers real-time, embedded Business Intelligence tools. Unlike most data warehouse implementations, the information in Eprisa’s decision support application are kept synchronized with the transactional database. This means that the decisions you make are based on up-to-the-second information, not stale data from last night...or last week.

Analysts select the “dimensions” (characteristics) and “measures” (counts and amounts) they find most meaningful. They can create and save custom pivot tables; with results displayed in seconds. Data can be viewed as various forms of charts and graphs. “Drill down” capability allows the user to display the actual Constituents, Campaigns, Transactions, etc. behind the numbers, and export the results to Excel for mail merge, etc.

**Eprisa Reports**

|   |   |   |
|---|---|---|
| <p><b>Management Information</b></p> <ol style="list-style-type: none"> <li>1. Amount</li> <li>2. Amount by Pledger</li> <li>3. Attributes</li> <li>4. Attrition</li> <li>5. Frequency</li> <li>6. Frequency by Pledger</li> <li>7. Recency</li> <li>8. Recency by Frequency</li> </ol> | <p><b>Pledge</b></p> <ol style="list-style-type: none"> <li>1. Attrition</li> <li>2. Life Attrition</li> <li>3. Month-to-Month Performance</li> <li>4. Original Amount</li> <li>5. Recency</li> <li>6. Search</li> <li>7. SnapShot</li> <li>8. Summary</li> </ol> | <p><b>Donations</b></p> <ol style="list-style-type: none"> <li>1. Donor Search</li> <li>2. Postal Analysis</li> </ol> |
| <p><b>Campaign</b></p> <ol style="list-style-type: none"> <li>1. Key Analysis</li> <li>2. Long-Term Value by List</li> <li>3. Long-Term Value by Source</li> </ol>  | <p><b>Batch</b></p> <ol style="list-style-type: none"> <li>1. Daily Source</li> <li>2. Summary</li> </ol>   | <p><b>User Defined or Pre-Configured Reports that are scheduled or initiated with real-time data</b></p>              |

Analysts can also create custom dashboards and scorecards for end-users. Each of these screens can contain a collection of custom “data widgets” (tables, reports or charts). Users can view the dashboards they have been granted access to, and can interact with them using the filters and options built into the widgets. Graphing, drill-down and export may be enabled by the widget’s author.

Read-only SQL access may be supported for those who wish to create their own queries or use third-party reporting and analytics tools that support ODBC connections.

## Mobile Access

“Road warriors” can connect to Eprisa from their iPad or other tablet PC. When travelling, Development Directors can call on top donors in the area, Major Gift Officers can file their contact reports from the restaurant or car.



## Membership

Flexible renewal strategies, multiple Membership Level schemas, Gift Memberships, replacement card processing, etc.

## Social Networks

Store any number of web links per Person; Facebook, LinkedIn, Twitter, Pinterest, etc.

## Inventory Management

Quantity-on-Hand for each component is reduced automatically as packages are selected for fulfillment. Postage Account can be set up as an inventory item. “Reorder/replenish” notification messages can be sent by email when level falls below preset threshold.

## Finance

Transactions by fund can be exported to popular accounting packages. Adjustments due to returned checks, etc. result in adjusting transactions in the next feed.

## Corporate Matching Gifts

Supports multiple matching firms per gift, as when both members of a donor couple work for matching companies.

## Real-time Biographics

On-demand appending of gender, age, wealth, income, charitable giving, etc.

**ADD/MAINTAIN CONSTITUENTS (15643913 RIDDLER, JOSEPH)** NEXT CONSTITUENTID   Enable Help

Donor | **Persons** | Addresses | Attributes | Transactions | Contacts | Tasks | Pledges | Appeals | Mem'ship | Survey | Images

**Relationships**

Add New 2 Delete Relationship

Constituent ID:  Search **Riddle, Rita W** Relationship: Father-Daughter

Address: 2112 Bishops Drive, Memphis, TN 38115-4610, United States of America

| # | Relationship    | Constituent ID | Constituent Name |
|---|-----------------|----------------|------------------|
| 1 | Aunty-Nephew    | 21297910       | Riddle, Lois     |
| 2 | Father-Daughter | 21292568       | Riddle, Rita W   |

**Easily maintain relationships Between Individual Constituents**

## Tributes & Memorials

Supports multiple “notifies” for each Tribute/Memorial. Donors may provide messages of condolence or congratulations to be passed on to specific notifies. System ensures that each notifyee is informed of only those gifts received since their last communication, even though notifies may be added at different times.

## Volunteer Management

System manages volunteers’ “Skills and Interests” and availability, match volunteers to one-time and recurring tasks and supports recruitment, recognition and reporting.

## Chapter/Branch Management Chapter/Branch Management

**CREATE BATCH** Enable Help

Required Fields:  View Batch

Batch ID: 20120226-... Batch Contents: 

| Quantity | Amount  |
|----------|---------|
| 100      | 2000.00 |

Mail Type: H - House Date Received: 02/26/2012 Date Prepared: 02/26/2012 Payment Method: CC-US - Credit Card US

Optional Fields: Batch Type: ..... ID Type: ConstituentId Source: AD1001

**Create Batches Quickly and Easily**

Donor | Persons | Addresses | Attributes | Transactions | Contacts | Tasks | **Pledges** | Appeals | Mem'ship | Survey | Images

Add New 1

Type: Recurring (Bronze: \$250 - \$20.84 per month) Frequency: M - Monthly Amount:  Target Amount:  1st Payment Date: 03/01/2012 Next Due: 03/01/2012

- Additional Info: Source: AD1001 - Financial Info: Fund: H - House Payment Method: Bank

Date Pledge Created: 02/26/2012 Date Pledge: 03/01/2014

| ID | Status               | Type                                  |
|----|----------------------|---------------------------------------|
| 1  | Open                 | Recurring (Bronze: \$250 - \$20.84 pe |
| 2  | Closed: Modification | Recurring (Bronze: \$250 - \$20.84 pe |

**Extensive information captured For each donor**

For chapter-based organizations, system can grant user access to constituent data by chapter, region, state, etc. Lists of officers for each location can be maintained.

## Planned Giving

System records details of outright gifts (stock, real estate, charitable lead trusts), expectancies (bequests, retirement plans, life insurance) and deferred gifts (charitable remainder trusts, charitable gift annuities), along with contacts and correspondence, attachment of media files, etc. Future development may involve integration with PG Calc, Gift Wrap, etc.

**IMPORT/EXPORT DATA**

- Import Bank File
- Import Door to Door file
- Import Bank Adjustment File
- Import Prospect File
- Export Pledge Payments
- Acknowledgments
- Merge/Purge
- Import NCOA Data Cleaning File

*Integrates into other platforms  
Or design your own solution*

**EXPRESS DONATION - 20120226-0001**

Transaction | Attributes | Batch Summary

- Batch Contents -

| Id | Name                     | Gift Type        | Source | Ack Letter                     | Fund                  | Amount | Bank Acct# |
|----|--------------------------|------------------|--------|--------------------------------|-----------------------|--------|------------|
| 1  | 25651958 Vigil, Ben      | Z - Web Donation | AD1001 | Apr Ack - General Ack 04 - Apr | H - House             | 33.00  | 0          |
| 2  | 556 Richman, Charles     | Z - Web Donation | AD1001 | Apr Ack - General Ack 04 - Apr | W - Website responses | 110.00 |            |
| 3  | 25668995 Algea, Patricia | Z - Web Donation | AD1001 | Apr Ack - General Ack 04 - Apr |                       |        |            |
| 4  | 543 Donahue, Joan G      | Z - Web Donation | AD1001 | Gen - Use default ack rules.   |                       |        |            |

*Express Donation allows for  
Fast online updates*

**TASKS**

Assigned To: Riddle, Steve | Type: I - Inbound | Method: P - Phone Call | Status: I - In progress

Due Date: 07/19/2011 | Time: 00:00:01

Subject: Check that Miss Cooper still wishes to donate.

Notes: Miss Cooper promises to make a \$300 donation next month.

| ID | Date       | Time     | Status      | Subject               |
|----|------------|----------|-------------|-----------------------|
| 1  | 07/19/2011 | 00:00:01 | In progress | Check that Miss Coope |

Constituent: 25526030

Name: Cooper, Faith | Phone: 0121 553 1197 | Type: Individual | Contacts: 0

*Maintain tasks that enable a workflow system  
Automatically remind staff of due/overdue tasks*