



# Features

Below is a summary of key features found in NeonCRM. While not exhaustive, this list presents an in-depth explanation of the many powerful tools offered in NeonCRM.

*NOTE: NeonCRM can be customized so that only the features your organization desires will be made available. Please consult with our staff to discuss your organizations particular needs.*

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## CRM Features

**Fully Cloud-based** Access your NeonCRM system from anywhere with true cloud technology. NeonCRM requires no software to be installed on your computer and is updated at no cost.

**Industry-Leading Security & Uptime** NeonCRM is hosted with Rackspace, the global leader in uptime and security. Many Fortune 100 companies choose Rackspace for online hosting and storage due to their 100% SLA uptime policy and industry-leading security.

**All-in-One** Manage all of your constituent/member/donor data in one place. NeonCRM is an industry leading system with true 360-degree constituent tracking.

**Unlimited Staff/Administrator Users** NeonCRM allows an unlimited number of staff and administrator user accounts with access to the database. There are no "per seat" license fees.

**10 Concurrent Staff Users** Up to 10 staff users can access NeonCRM at the same time. Additional concurrent users can be added.

**PCI Compliant Payment Processing** NeonCRM can securely process real-time online credit card and eCheck payments direct from the client website and/or by staff from within the database. NeonCRM works with BluePay, IATS, Authorize.net, ACH Direct, and PayPal Pro. NeonCRM is fully PCI compliant and works closely with every merchant account to ensure the integrity of NeonCRM's security is never compromised.

**Relationships** NeonCRM has one of the most sophisticated relational CRMs on the market. Link individual and organizational accounts with customizable two-way relationships easily.



**Easy Account Search** Easily search for any individual or organizational account from any page by entering an account number, partial spelling of a name, organization or contact within an organization.

**Prospecting/Solicitations/Scheduling** Easily track potential donors, members or VIP attendees with moves management and connect activities, notes, and reminders to the account. Assign, alert, and notify crucial staff members of important tasks and duties to be performed.

**Permissions** Ability to control which staff users can "view", "edit", or "delete" many different types of functionality and transactions in the NeonCRM.

**Smart Householding** Easily keeps track of residence, addresses, household salutation, plus an aggregate household view of combined household contributions, event activity, membership, etc.

**Self-Import Utility** Load more basic constituent data into the system with a powerful Self-Import tool at no charge. Organizations can easily upload simple account, donation, event, and membership data and transactions at no charge in the beginning or as an ongoing process if necessary. Save your import mapping and append data to existing accounts easily.

**Professional Engineer Import** NeonCRM engineers can also provide a quote for more complex data conversions to suit the custom needs of any organization's data structure. NeonCRM has experience converting clients from nearly every system on the market.

**Duplicate Checking** Keep your data clean with advanced duplicate checking tools on individual accounts or a system wide duplicate scanning capability. Easily merge existing accounts to consolidate any duplicate records.

**Custom Fields** Add unlimited custom database fields to fit any organization data needs. Any custom database field becomes instantly available in the NeonCRM, within reports, and email audience queries. NeonCRM users also have the option to allow these custom database fields to display on website forms. This allows organizations to more effectively understand their constituency as they come to their organization via their website.

**Source Tracking** Track the source(s) with which any account or action came to your organization. Create new sources on the fly as well.

**Unlimited Address & Shipping Address Tracking** Easily track any number of addresses under any account including temporary one-time addresses or auto-switch seasonal addresses to ensure effective, timely communication.

**"No-Solicitation" Options** Easily remove people from all communications or specifically from email communications.

**Action Log** Easily view history of all the database activities by staff for the last 90 days.

**Google Maps Integration** Click on the mapping link next to any address and see it in Google Maps.

**USPS Integration** Easily search and pull back the zip code +4 for any account in the database. This helps to better target constituents in reports and saves money on mailings.



**Pictures & Logos** Easily add pictures and logos to all of the account in the NeonCRM database. These can be uploaded by staff or the end users.

## Website Integration

**Online Forms** NeonCRM can automatically apply the look and feel of your website to every secure, connected web form that will automatically feed your NeonCRM database and handle transactions. NeonCRM allows for unlimited donation pages for specific campaigns, membership join/renew applications, event calendars, event registration forms for every event, and more.

*Example:* [http://www.feea.org/index.php?option=com\\_content&view=article&id=1543](http://www.feea.org/index.php?option=com_content&view=article&id=1543)

**Custom Web, Petition, and Survey Form Builder** NeonCRM allows organizations to build custom webforms that automatically feed data into the NeonCRM database that can create new accounts or append data directly to existing accounts.

**Custom Newsletter Opt-in Forms** Build custom newsletter opt in/sign up forms to unlimited communication options. Constituents can always manage their communication preferences with auto-login to the constituent login portal for easy management of their preferred email lists.

*Example:* <https://www.z2systems.com/np/clients/aradvocates/survey.jsp?surveyId=2>

**Constituent Login** Any constituent/donor/member can log in and manage their account in a secure, password protected area. NeonCRM even allows for restricted member page access, profile updating, giving history management, membership renewal, easy event registration, membership directories, and the ability to create restricted page access to constituents based on any field in the database. Create a private website for permission based access behind the login.

**Webform Configuration Tool** Organizations can easily adjust and manage the name or order of fields on their NeonCRM forms. Customize and simplify your forms instantly.

**Upload Unlimited Web Templates** Upload unlimited custom web templates to any event or campaign donation page.

**Social Network Integration** Share the good news to Facebook, Twitter, and other social networks.

**Google Analytics** Track web traffic/analytics on NeonCRM forms within your current Google Analytics account that is connected to the organizational website.

**Mobile-Ready Forms** NeonCRM webforms can be optimized for use on mobile devices (iPhone, Android, Microsoft OS, and BlackBerry platforms).

**SSL/https Secured Forms** All NeonCRM pages are secured and encrypted for safe and secure transmission of sensitive information. Organizations can opt to piggyback the <https://www.z2systems.com> Thawte SSL certificate and would display as [https://\[yourorganization\].z2systems.com](https://[yourorganization].z2systems.com) for a more branded experience.



## Donor & Gifts Management

**Online Donation Forms** Easily collect one-time and recurring/scheduled donations online. NeonCRM is truly connected to the organization website and allows for unlimited campaigns pages.

**Donation Giving Levels** Set up custom pre-defined giving levels to suit specific organizational goals.

**Unlimited Campaigns, Funds, and Purposes** Segment donations into an unlimited number of campaigns with unlimited default funds and purposes. NeonCRM allows organization to even create a separate donation form for any campaign to be attached directly to the organization website. Easily track and link these types of transactions earmarked for specific purposes to better coordinate with accounting.

**Pledges** Schedule and manage your donors' intent to give and apply donations to existing pledges.

**Soft Credits** NeonCRM supports one-off soft credit assignments to any individual or organizational account and even allows for automatic "rule-based" soft credits to specific attached accounts (ex. Board Member to Organization -or- Husband to Wife).

**Matching & Split Gifts** Easily track any matched giving by employers or split a donation into multiple parts attributed to different campaigns, funds and purposes.

**In-Kind Donations** Track in-kind donations and send specific automated donation appreciation emails and letters triggered by these in-kind donations.

**Honor/Memorial Donations** Easily attach acknowledgements to donations or allow for the Donation form online to feed honor or memory information into the NeonCRM.

**Anonymous Giving** Organizations can attribute donations via "anonymous donor name" or by "anonymous amount".

**Batch Donations** Quickly search for accounts, add new accounts, enter donations, and auto send donation receipts with the NeonCRM batch donation entry system.

**Recurring Donations** Automatically process recurring/scheduled donations.

**Prospecting/Solicitations** Easily track potential donors with moves management and connect activities and reminders connected to the overall prospect

**Grant Tracking** Easily manage your grant schedule, step-by-step and document-by-document.

**IRS Receipting** Automatically generate IRS-approved tax receipts via email and send them out to your donors. An easy mail merge process will allow you to send receipts via mail as well.



## Social Fundraising

**Personal Donation Pages** Allow your constituents to create their own fundraising campaign pages. Whether it is a walk-a-thon, 5k run, or school play, turn your organization's constituents into fundraisers. All information automatically feeds directly back into the NeonCRM and is tracked to the specific campaign as well.

**Data Pushed Seamlessly to NeonCRM** Since the social fundraising module is part of the NeonCRM, fundraisers and their donor become part of your donor pool within the database allowing organizations to more easily attract and retain sustainable donors over time.

**Branded Pages** Add your campaign or organizational header to the page, overall campaign message, allow fundraisers to add their own message and even add their team picture.

**Campaign Tracking** Allow all individual fundraising pages to be connected to specific campaigns so all revenue is tracked up to the overall campaign.

**Online Sign Up/Registration** Individuals looking to create their own fundraising pages will be guided through the full process online. They upload their picture, create an explanation of why they are raising money, and set the goal amount they are aiming to raise. Turn your donors into fundraisers.

**Integrated Events and Fundraising Management** Bring together fundraising and events registration into one cohesive campaign. Register for the main event that people are raising money for right on the individual fundraiser's page.

**Campaign and Individual Thermometers** See real-time results of your fundraising efforts, including a rolling list of all donors. NeonCRM auto generates html code allowing organizations to implement a dynamic thermometer for a specific campaign.

**Donor Message Board** Allows individual donors to leave encouraging messages to the team captain or personal fundraising page.

**Social Network Integration** Easily enables fundraisers to share their fundraising page on Facebook, Twitter, and other Social Networks

**Leverage Low Merchant Account Fees** Your NeonCRM is able to process credit card and eCheck payments with your existing merchant account. There are no additional fees associated allowing organizations to keep more of the hard-earned funds raised.

**Recurring Donations** Allows for recurring donations on the social fundraising pages to turn donations for one event into long term sustainable donors.



## Events & Registration Management

**Online Registration** Easily create content driven event detail web pages and online registration forms to allow attendees to register for the event, class, seminar, or conference quickly and easily.

**Branded Pages** All online forms and pages will mimic the look and feel of the organization website and can easily be incorporated via simple hyperlinking.

**Dynamic Event Listing** Easily link to a dynamic page with all of the organization's upcoming events. List your events online using NeonCRM out-of-the-box table, list, or calendar format.

**Eventbrite Integration** NeonCRM offers integration with Eventbrite that allows for instant upload of transactional information from Eventbrite into NeonCRM. Eventbrite data can be matched to existing accounts and reporting allows for in-depth reporting across Neon that can include attendance to events run through Eventbrite.

**Event Notifications** Automatically notify registrants when they sign up for an event with a customized email that includes the details of your event. An event reminder email can be setup to remind your registrants prior to the event as well.

**Campaign Tracking** Allow all individual fundraising pages to be connected to specific campaigns so all revenue is tracked up to the overall campaign.

**Advanced Ticketing** Create as many ticket prices as your event requires.

**Sessions** Create complex events with sessions, plenaries, and breakout sessions.

**Conditional Ticketing** Automatically apply ticket prices for your VIPs.

**Quick Search** Easily organize your events by category, topic, and price.

**Campaign Template** Customize different web templates for any event. Often used by sister organizations or microsite management between different chapter organizations, for example.

**Discounts** Give discounts to constituents based on your own criteria or coupon codes.

**Event Custom Fields** Create an unlimited number of questions to ensure you are gathering the correct information from each attendee.

**Waiver Statements** Create custom waiver statements during the online registration process for any purpose.

**Volunteer Assignments** Ability to create volunteer or paid positions for your event and assign volunteers to projects. Ability for staff to assign positions -or- for volunteers to sign up online.

**Mark Attendance** Track who registered for your event and mark who actually attended the event. This information is stored for the entire event and on each attendee's account.

**Name Badge Report** Easily print name badges for your event



## Membership Management

**Custom Terms** Manage as many custom membership/subscription terms as you like. Monthly, Quarterly, Annual, Multi-year, Lifetime memberships are available along with auto-renewal.

**Rolling & Calendar Memberships** NeonCRM allows for a variety of membership term set ups including a traditional calendar start date each year or membership join date/expiration dates based on the transaction date.

**Branded Join/Renew Pages** All online forms and pages will mimic the look and feel of the organization website and can easily be incorporated via simple hyperlinking. Both “Join” and “Renew” forms are available.

**Organizational, Individual, Household** Set up organizational memberships, individual memberships, group memberships and household memberships. Limit the number of individuals that can join under a group membership.

**Advanced Membership Fee Management** Maintain separate Join and Renew fees for every type of membership and admin override for on-the-fly adjustment to fees.

**Subscription/Membership End Date Adjustment** Automatically adjust the expiration date of a membership or subscription to the end of the month. This is ideal for magazine subscriptions and giving members extra time to renew.

**Additional Membership Amount** Enables members to leave an additional membership amount or donation along with their membership purchase.

**Membership Grace Period** Setup a grace period allowing members to renew their membership within a certain period.

**Discounts** Provide member-only discounts for events and online store purchases. Select which member groups are allowed discounts or allow to all member groups.

**Online Directories** Manage public and/or private online member directories. Add filters to search the directories based on standard database fields or any custom database field.

**Constituent Login Portal** NeonCRM allows for restricted member page access, profile updating, membership renewal, easy event registration, and membership directories,

**Member-only content** Provide member-restricted page access to constituents based on any field in the database. Select which member groups are allowed access or allow to all member groups to have access, restricting other constituent types from accessing.

**Member Status Message** Turn on a listing of the members current membership status whenever they are logged into the NeonCRM constituent login portal. This clearly shows everyone where they stand with their membership



**Complimentary Membership** Encourage donors and offer recognition by placing donors into membership tiers by adding up the totals of their membership and donation giving. *Example:* A "Silver" member donates \$200 which moves them up to the "Gold" membership designation.

## Reports & Querying

**Sophisticated Query** All account fields are reportable and all reports are exportable via Excel or CSV. User-friendly reporting query allows search criteria on any field, including all custom database fields.

**Transactions** Report on all financial transactions and prepare automated financial transactions for easy access, export, and configuration. NeonCRM clients use a variety of accounting platforms including QuickBooks, Quicken, Financial Edge, Sage/Peachtree Products, and Microsoft Products.

**Executive Dashboard Reports** Instant comparative visualization (year to date, month to date, previous year comparison) of your organization's success

**One-Click Reports** NeonCRM comes with over 40 pre-configured one-click reports for fast and easy viewing of important information.

**Custom Reports** Build your own custom reports using any data in the system and select any output columns necessary, including all custom fields created by your organization.

**Saved Reports** For frequently used custom reports, save any configuration of reports for later. Restrict user access to saved reports or keep private for personal use.

**Exclusionary Reporting** Pull reports containing accounts that have not performed a desired action.

**Dig Deep** Use sophisticated queries to look in subsets of data across all modules.

**Public Reports** Easily share dynamic, password protected reports with board members via a web link to share via email or within the constituent portal on a restricted page specific for Board Members only.

**Pre-Calculated Report Fields** Easily pull in data sets displaying occurrence and amount totals for the past 10 years within one report across multiple modules.

**Export Results** Export your results to CSV, Excel, or perform mail merges.

## Email & Postal Communications

**Mass Email Communications** NeonCRM has a built-in sophisticated email system that allows organizations to build, send and track mass email campaigns to your constituency.

**Email Audience Management** Build sophisticated queries on any field in the system, including custom database fields, to build an unlimited number of dynamic email audiences. These can be





used internally in conjunction with the NeonCRM email communications or exported for upload to any external, 3<sup>rd</sup>-party Email Service Provider (e.g. MailChimp, Campaign Monitor, Vertical Response, Constant Contact)

**Custom Templates** Take advantage of NeonCRM multiple template builders or upload your own html design and send through the NeonCRM servers.

**Email Tracking** See records of every email sent to on each constituent's record. See if they are opening emails, clicking through, or if the email has bounced.

**Campaign Statistics** Track the results of your email campaigns in the Communication module to see the success of every campaign from an overview perspective.

**Automatic System Emails** Set up emails to automatically send after constituents interact with your organization. The database can handle a number of system emails based on the action performed by the constituent such as donation appreciation emails, membership welcome emails, event registration/reminder emails, store purchases, and more.

**Conditional System Emails** Set up emails to automatically be sent out based on conditional logic from the NeonCRM. These may be in response to "donations above \$500", or "in-kind donations", or "transactions to a specific campaign" in order to more specifically address the action that was taken by the constituent.

**Sequential System Emails** Send a pre-determined series of emails to constituents based on a trigger/action. For example, this works extremely well for new members joining where a series of four welcome emails with different content can automatically be sent to every member to provide a consistent, timely welcome message.

**Mailing List Signup** Provide a form connected to the organization website for constituents to join email lists, newsletters, etc.

**Mail Merge** Create print mailings from constituent data or push reports out via Excel/CSV that can be used for external mail merges with other 3<sup>rd</sup> party mail merge programs or to be sent to a mailing house. Integration with Microsoft Word also enables customers to merge contacts and data with pre-built templates built in MS Word.

**Merge Queue** Automatically add constituents to lists for mail merges based on actions performed from staff entry or entered by constituents via the connected webforms.

**MailChimp Integration** NeonCRM offers integration with MailChimp that allows for instant sending of email audience lists into MailChimp for email campaigns. MailChimp campaign statistics are also pulled back into the NeonCRM for a true integration between the two systems.

**Secure Auto Authentication Feature** Eliminate duplicates and increase access by allowing your constituents with login credentials to automatically append new transactions to their existing donor/member record without having to log in. Verified by the email address connected to the NeonCRM record within the CRM database.

*Example:* Send out a link to your donation form via email to a donor, and they will not need to enter their account information or login/password to complete the transaction.



**BCC External Email Tracking** Whether on your iPhone, in Gmail, or Outlook, track email conversations from outside NeonCRM by simply bcc'ing your Neon system with a unique email address that will track the conversation back to the constituent record in Neon.

**News Page** Create your own news articles and post them to an online news listing page with an RSS feed.

## Custom Webform, Petition & Survey Builder

**Form Builder** Use a drag & drop utility to build surveys or forms of any type that auto feed the information directly into the NeonCRM. Used by organizations for custom information collection and surveys.

**Petitions** Easily create branded online petition pages with proper form fields, special messages, embedded videos, and pictures in order to get others to sign.

**Customized Donation and Membership Pages** Create your own custom transaction pages, including multipage membership application forms and donation forms with drop down campaign allocation.

**Application/Contact Us Form** Used for application process that requires review and approval by staff before becoming a member, for example. Also used for "Contact Us" form.

**Custom Newsletter Sign Up Form** Can be used to build a complex custom Newsletter form when allowing sign up to multiple formats of communication. *Example [click here](#).*

**Create Accounts** Allow these forms to create NeonCRM records or remain anonymous.

**Track Results** Store and track survey results gathered from the responses.

**Real-Time/BCC Alert Function** Any staff member or even board member can be bcc'd whenever someone submits information via any form.

## Online Store & Digital Download Center

**Constituent Tracking** All purchases are linked directly to the constituent's record to further enhance the 360-degree view of a constituent's true impact on the organization.

**Shipping Options** Use flat-rate shipping or enable the integrated calculated shipping rates at no additional cost via the United States Postal Service API shipping rates connection for accurate shipping costs.

**Tax & Handling Fees** Manage the extra fees specific to your needs.

**Inventory Tracking** Automatically track on-hand product inventory.

**Custom Layouts** Adjust the look and feel of the store header, number of columns wide, number of products per page, and more.



**Product Thumbnail and Descriptions** Each product has its own unique direct web URL with multiple image display and product descriptions.

**Catalogs** Categorize products into catalogs that can be easily reached from any page in the online store pages.

**Offline/Online Product Display Option** Organizations with onsite product sales can elect to list products in online, offline, or both.

**Digital Downloads** Sell downloadable files as a product. This area can also be used for document/file downloading that your organization wants to track. Any person downloading even free documents/files will have to “register” to receive the file so your organization can engage them again and again.

**Order Management Queue** Manage and process orders that have been placed via the NeonCRM order management queue

**Email Shipping Notification** Once orders have been processed organizations can send a notification containing a message and shipping tracking information.

**Product Keywords** Create your own product keywords to improve searches for your documents and or products within the store search function.

**Discounts** Put certain products on sale and allow Members to receive special discounts.

## Staff/Volunteer Project & Timesheet Management

**Assign Accounts as Volunteers** Quickly search existing records and turn them into a volunteer that can be assigned to projects and tracked. The record will also contain vital information about the individual’s volunteer preferences and any other items that require tracking.

**Event Volunteer Management** Assign positions for specific events for deeper tracking.

**Time Tracking** Track constituent & volunteer hours.

**Mileage & Expenses** Allow volunteers to report mileage and expenses.

**Volunteer Application** Create custom online volunteer application forms.

## QuickBooks Connection

**QuickBooks Synchronization** Unparalleled functionality that automatically syncs transactions to QuickBooks with a direct integration that saves time and reduces errors by eliminating the need to enter data twice.

**Online or Offline** The NeonCRM tie-in applies to both online and desktop versions of QuickBooks.



**Sync Campaigns** Map your campaigns to different *service items* and *classes* for proper management of Donations, Events, Membership transactions to specific funds and purposes as well.

**Sync Queue** Easily track which transactions have been synched between NeonCRM and the QuickBooks platform.

**Sync Any Transaction** Gift, Event, Membership, Store transactions are all uploaded and posted to QuickBooks.

**Manual or Auto Syncing** Choose a manual data push or set up a scheduled automated push.

## Document Sharing Center

**Access Protection** Make documents available to the public or restrict them to constituents.

**Version Tracking** Keep track of who has made changes to documents.

**Public Document Upload** Allow constituents to upload documents within the Constituent Login Portal.

**Document Repository** Support uploading, checkout, recycle bin management by staff of any file type direct to the database document center.

# Additional Options & Integrations

**Application Programming Interface (API):** <http://help.neoncrm.com/>

**NeonCRM Open API** gives organizations some great possibilities for further customization. With the right development team or internal programmer(s), organizations can:

- **Custom web forms** that feed into your NeonCRM system
- **Synchronize constituent data** between NeonCRM and another application/database
- **Build your own** executive dashboards with charts and graphs
- **Custom constituent login** area, using NeonCRM's built in authentication for constituent user names and passwords

## Eventbrite Integration:

**Register** Use Eventbrite to manage the registration process for online and in-person ticket sales

**Track** Learn about the success of both your event and post-event outreach



**Data Syncing** Eventbrite registration data/history can easily be pushed into NeonCRM, syncing up with existing records or creating new constituents

**Report and Communicate** Eventbrite history can live in NeonCRM alongside Constituent, Donor, and Membership data. Prevent your important event data from being disconnected and in a silo.

## MailChimp Integration:

**Email Audiences** Query email segmentation audience lists and push into MailChimp for email campaigns.

**Statistics** MailChimp campaign statistics are pulled back into the NeonCRM for a true integration between the two systems.

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## Wealth Screening Look-up Utility (WealthEngine & DonorSearch)

Our integration with **WealthEngine** ([www.wealthengine.com](http://www.wealthengine.com)) and **DonorSearch** ([www.donorsearch.net](http://www.donorsearch.net)) enables your organization to drill down and identify greater giving potential and capacity in your NeonCRM or from an acquisition list. NeonCRM and these wealth screening look-up utilities will help your organization identify major gift donors, target solicitations to appropriate constituents, gauge how much money to "ask" for, save time, and campaign costs.