

Donor management

Unit4 Nonprofit Model capability overview

Unit4's non-profit model for donor management is part of a comprehensive and integrated solution suite designed to streamline and enhance the operations of non-profit organizations. Tailored to meet the unique needs of non-profit organizations, the Unit4 non-profit model enables you to efficiently manage and report on donor relations, optimize internal processes, and achieve your mission. You can strengthen donor relationships with increased spending efficiency and timely funding reporting.



Key features

- Centralized donor database with detailed profiles
- Donor creation, review, and reporting
- Dedicated pre-defined donor workspace
- Tracking of donor interactions, communications, and contributions
- Segmentation and personalized communication tools
- Donor retention analysis and engagement strategies
- Reporting and analytics to measure fundraising effectiveness

Benefits

- **Enhanced donor engagement** - The donor management module ensures personalized communication, leading to improved engagement and long-term support.
- **Efficient resource allocation** - ERP, Procurement, and FP&A modules provide insight for effective financial planning and resource distribution.
- **Streamlined operations** - HCM and Procurement modules optimize human resource and procurement processes, saving time and reducing manual effort.
- **Data-driven decision-making** - Comprehensive analytics and reporting tools enable data-driven decision-making for strategic planning.
- **Mission alignment** - The software suite empowers employees to align their operations with their mission, ensuring efficient execution of projects and initiatives

Why Unit4?

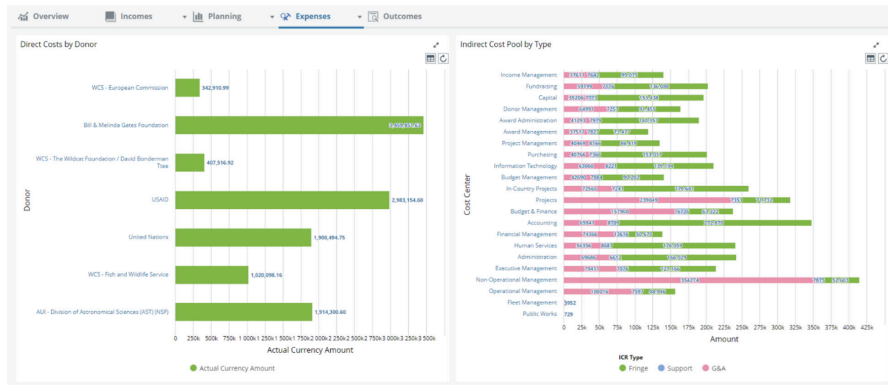
Tailored for Non-profits - Our suite is specifically designed to address the unique challenges and requirements of non-profit organizations.

Scalability - The suite grows with your organization, accommodating increased donor engagement and expanding programs.

Dedicated Support - Our dedicated support team offers assistance, training, and ongoing guidance to maximize software utilization.

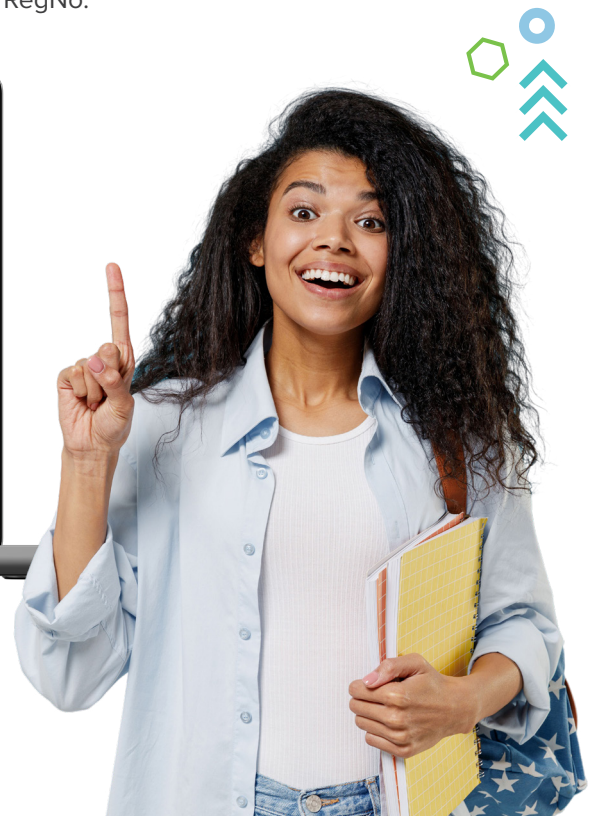
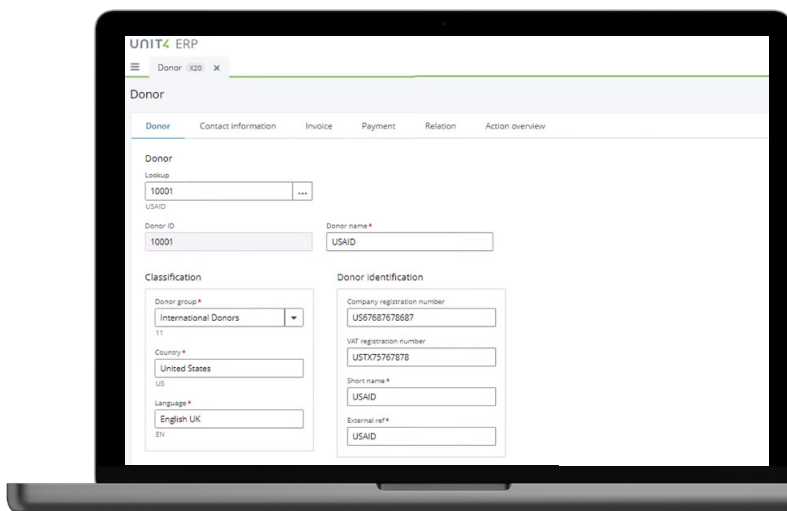


1.0 Direct project cost by donor



1.1 Donor creation and review

The creation of donors can be done in 3 different places in the non-profit model. In accounting, in accounts receivable, in project management, and in sales and customers. New donors are added or amended using workflows. The workflow triggers on a multitude of fields at the donor level including donor group, donor ID, donor name, bank account, reg number, currency, IBAN, language, payment method, status, terms, and VAT RegNo.



*Donor reporting - Some dependencies on CRM by linking Unit4 ERP via Industry mesh

1.2 Donor workspace

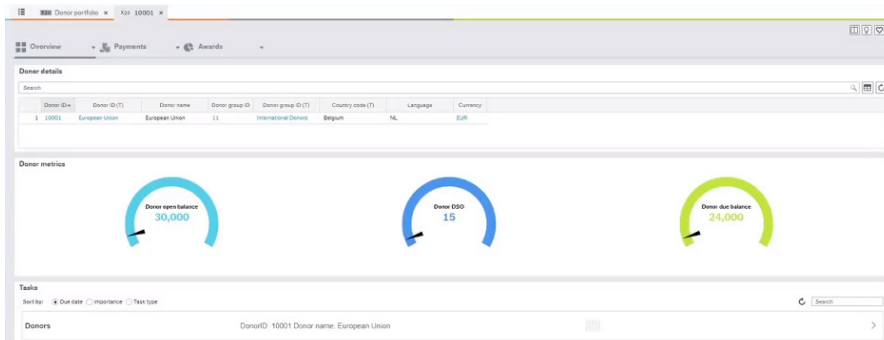
Each of the workspaces is independent, meaning all are out-of-the-box, set as pre-defined so they cannot be amended by the user.

Code	Workspace	Comment type	Comment value	Predefined	Status	Action
ABSENCE	Absence manager	Attribute	Cost centre	☑	Active	
AM01	Award workspace	Attribute	Award	☑	Active	
PROJECT	Default project setup	Attribute	Project	☑	Active	
AM02	Pre-award workspace	Attribute	Pre-Award	☑	Active	
PC02	Program workspace	Attribute	Program	☑	Active	
PC01	Project workspace	Attribute	Project	☑	Active	
ABSENCE_220	Absence manager x20	Attribute	Cost centre	☑	Active	
GL01	Cost centre workspace	Attribute	Cost centre	☑	Active	
AR01	Donor workspace	Attribute	Customer ID	☑	Active	
HR01	Employee workspace	Attribute	Resource Number	☑	Active	
HR02	HR workspace	Attribute	Client code	☑	Active	
AP02	Incoming invoices workspace	Attribute	Transaction type	☑	Active	
AP01	Supplier workspace	Attribute	Supplier ID	☑	Active	
SA01	System Admin workspace	Attribute	Client code	☑	Active	

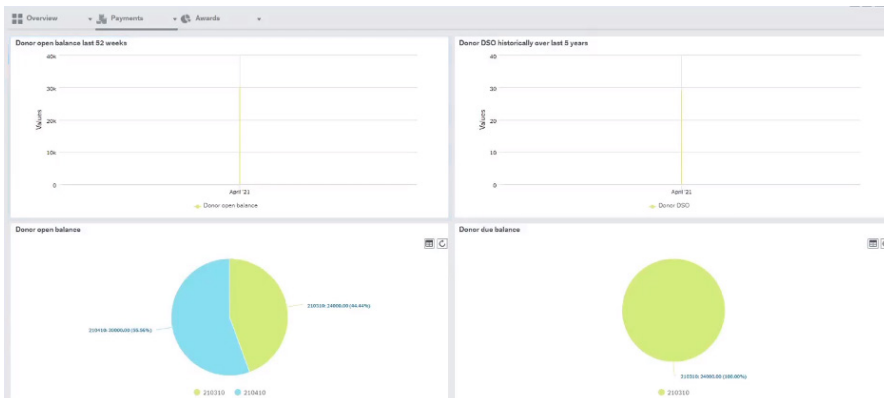
An out-of-the-box portfolio of donors is provided. This contains the portfolio of all donors and their details.

Donor ID	Donor name	Donor group ID (T)	Country code (T)	Language	Currency	Donor open bal.	Donor DSO (DPS)	Notifications	Refresh
10000	Dummy Customer	Domestic Donors	Netherlands, The	EN	EUR	0	0		
10001	European Union	International Donors	Belgium	NL	EUR	30000	15	Donor s...	
10002	Ministry of Foreign affairs	International Donors	United Kingdom	NL	GBP	20000	15	Donor s...	
10003	Prico Warehouse Coopers	International Donors	Netherlands, The	NL	EUR	13055	15	Donor s...	
10004	Bill & Melinda Gates Foundation	International Donors	United States	US	USD	30000	15	Donor s...	
10005	Bloomberg	International Donors	United Kingdom	EN	GBP	17706	15	Donor s...	
10006	Paul Getty Foundation	International Donors	United States	NL	USD	15366	15	Donor s...	
10007	Danida	International Donors	Germany	DE	EUR	1279500	15	Donor s...	
10008	USAID	International Donors	Netherlands, The	NL	EUR	180000	15	Donor s...	
10009	United Nations	International Donors	United States	US	USD	120000	15	Donor s...	
10010	DFID	International Donors	United Kingdom	EN	GBP	258900	15	Donor s...	
10011	Mr. Zuckenberg	Domestic Donors	United States	EN	USD	2724	15	Donor s...	
10012	Ms. Bidango	Domestic Donors	United States	EN	USD	10200	15	Donor s...	

Drill down on specific donors for further metrics using dashboarding.



View the payment history for each donor.

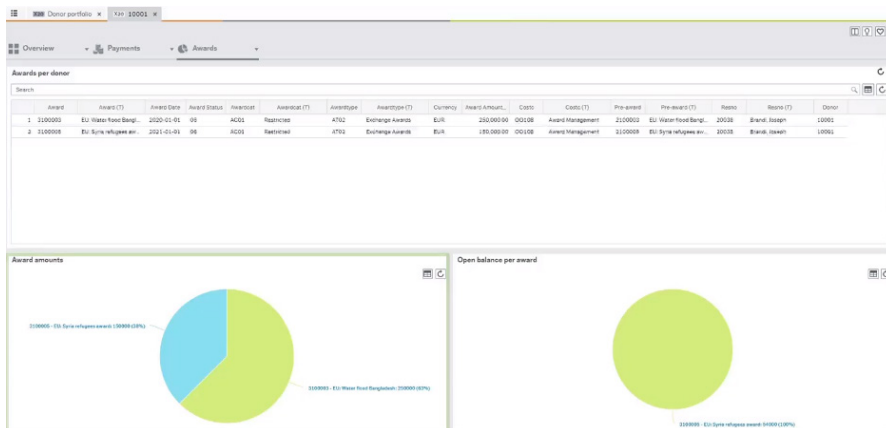


“Heifer struggled with systems unable to address donor transparency, reporting complexity, and a real-time access to data globally. They had four or five different accounting systems spread across the globe and no way to get a comprehensive picture of the picture. Unit4 delivered high donor transparency, to boost its support for 3 million families in need.”

Heifer International

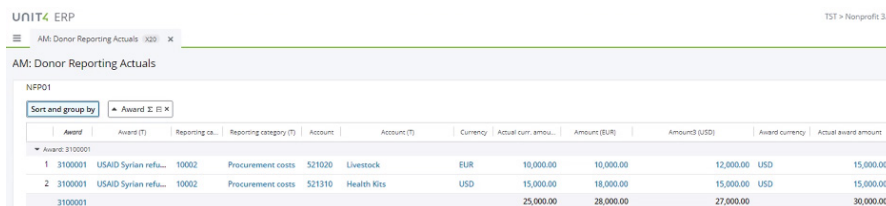
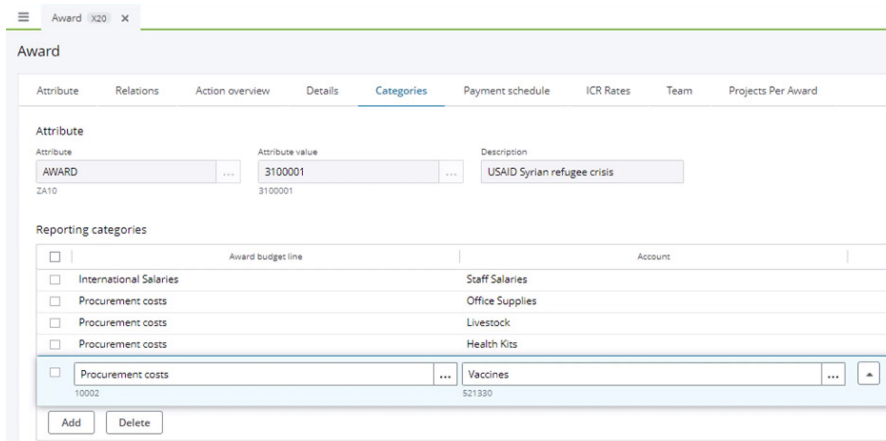
<https://www.unit4.com/our-customers/heifer-international>

As donors are one of the main sources of funding for Non-profits, drill down on awards by date and type.



1.3 Donor creation and review

Reporting based on individual budget lines, accounts, and reporting categories.



Includes a full set of all the financial data, all at the grant level in the grant currency and for specific reporting categories that the donor requires.

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