



Make a bigger difference

## Features

### *All the Features you need to build a powerful partnership with your donors*

Eleo was developed with you in mind. Eleo's comprehensive features allow you to record and track all your information in one easy-to-use, online software. No matter your size, Eleo's features will help you cultivate stronger, more sustainable donor relationships, build long-term stewardship, and increase the return on your fundraising efforts.

#### Donor and Contact Management

Eleo Online Donor Management Software is designed to help make entry and access of records quick and easy, on any device and from any location. You can build and maintain fuller donor and contact profiles and improve your communication with your supporters, which means better support for your cause. Eleo helps you gain a deeper understanding of your donor base, so you can make sure your supporters feel like an important part of your cause.

- Easy-to-read donor/contact page
- Quick and simple entry
- Fast search tool
- Standard and customizable fields
- Unlimited mailing and email addresses
- Unlimited phone numbers
- Unlimited notes
- Giving history
- Giving statistics
- Graphical giving summary
- Matching gifts
- Soft credits
- Pledge information
- Memberships
- Recognition levels
- Staff/Solicitor assignments to donors
- Anonymous Donor Filters

## Donor and Contact Management (continued)

- Mailing history
- Volunteer history and hours tracking
- Donor interests
- Donor groups
- Social media and website links
- Donor communication preferences
- Interactive relationship links
- Document storage
- Task scheduling and completion tracking
- Contact type identifications
- Dynamic contact lists
- Donor source
- Formal and informal salutations
- Background employment and education information
- Contact familiarity note
- Chronological history of interactions and touches
- Event participation history
- Robust reporting

## Gift Entry, Tracking, and Acknowledgements

Donors and supporters want to feel valued for their contributions. Eleo Online Donor Management Software makes it easy to enter and track all types of gifts and keep up with Thank-you letters and acknowledgements. Our software includes tools to evaluate your fundraising and solicitation methods, so you can see what's most effective and can target your efforts where they will make the biggest impact.

- Fast and easy gift entry
- Fund, Campaign, Appeal and Appeal category
- Payment types: cash, check, credit card, in-kind, PayPal and assets
- Fair market value entry
- Gift date and deposit date
- Soft credits
- Matching gift entry, application, and processing
- Credit card processing
- Pledge creation, tracking, and payments
- Gift source tracking
- Communication preferences
- Reference information
- Anonymous donations
- Membership levels, payments, and renewals

### Gift Entry, Tracking, and Acknowledgements (continued)

- Staff responsible for gift tracking
- Staff personal note tracking
- Receipts and Thank-you letter processing at gift entry
- Receipt and Thank-you letter Mailing Dashboard
- Tributes and acknowledgements
- Note entry
- Statement generation
- Extensive gift and contact filters on search screens

### List Building

Producing a tailored list of contacts is critical for effective appeals, event announcements, and other communications. Eleo quickly generates donor/contact lists based on your selection criteria and allows you to easily modify the results to fine-tune each list to exactly the population you are looking to reach.

- Easily create and save lists
- Easily filter data using:
  - Equal to
  - Greater than
  - Less than
  - Date range
  - Dollar range
  - Appeal, campaign, event
  - And more
- Edit list results
- Modify list building criteria
- View, print and/or export lists
- Export list for mail merge, email software, event software and more
- Access dynamic lists which automatically update as information is added to the software
- Save lists
- And more

### Mailings and Communications

We know mailings and communication are critical to engaging your supporters. Eleo's mailing features save time and provide the tools necessary to monitor acknowledgement timeliness and completeness. Our Mailing Wizard simplifies mailings into a step-by-step process to speed and ease mailing creation. The Mailing Dashboard displays Thank-you letters that need to be processed.

### Mailings and Communications (continued)

- Easily create mailings, emails and labels

- Create solicitations, newsletters, Thank-you letters, receipts, pledge reminders, membership renewals and event mailings
- Send individual or batch mailings
- Create and mail receipts and Thank-you letters right from gift entry
- Create contact lists or utilize existing contact lists for mailings
- Identify recipients using gift filters and/or contact filters for mailings
- Personalize mailings with data from donor profiles
- View donor contact history which automatically populates with mailings sent
- View the Mailing Dashboard to see receipts and Thank-you letters not sent
- Search and view complete mailing history
- Directly integrates with Constant Contact, MailChimp and Avery Labels
- Mail merge with Microsoft Word
- Create a library of recurring templates
- Upload existing Word documents for use within Eleo

### To-Dos and Calendar

Whether you're a small or large organization, we know your staff members are juggling many demands on their time. That's why our software includes tools to help your nonprofit coordinate tasks and schedules, so everybody's on the same page. Clearer lines of internal communication means increased efficiency—so you can accomplish more.

- Easily create tasks associated with contacts, gifts, events, mailings, grants and other
- Customize unique task types
- Organize your tasks and to-dos on the Homepage calendar
- View all user's tasks on the scheduler
- View both calendar and scheduler by month, week and day
- Identify complete and incomplete items
- View recorded tasks in contact history
- Add unlimited notes to tasks
- Search by user, task type, priority and completion status
- Assign tasks to one or more users
- Schedule recurring tasks
- Set Reminders for tasks viewed with a pop-up screen at sign-in
- Access Task Reminder and Task Assignment from any screen on the software
- Integrates with Google Calendar

### Reports and Analysis

Eleo provides a wide variety of reports, all of which you can customize using various filters. Eleo also has a Report Writer that allows you to build your own reports.

## Reports and Analysis (continued)

Your data can tell you a lot about your nonprofit's record of success in raising funds and cultivating supporters. Eleo provides you with the tools you need to efficiently monitor and evaluate your organization's fundraising and donor communication activities—so you can build upon what works to enhance your future efforts.

- Access a large number of standard reports with customizable filters
- Use our *Report Writer* to create your own reports
- View, print or export your reporting information
- Create reports in Excel, PDF, and CSV formats
- Create and save favorite reports for easy access
- View reports on desktop and mobile devices
- Analyze donor trends, goals met, appeal successes and more
- Adjust report criteria to narrow in on the data you need
- Report on donors, gifts, funds, campaigns, appeals, events, pledges, memberships, volunteers, Thank-you letters, and more
- Directly Integrates with QuickBooks Online and more

## Events

Events are a common way to raise funds and exposure for your organization. Eleo's Events Module is designed with multiple tools to organize your lists, activities, sponsorships, attendance, payments, expenses and more—so you can control all the moving parts of an event.

- Easily create and track events
- Create invitee lists and track attendance
- Establish activities within the event: dinners, raffles, ad journals and more
- Create and designate groups within event activities: golf foursomes, table assignments, and more.
- Establish and track sponsorships
- Record payments for attendance, activities and sponsorships
- Track mailings associated with the event
- Record expenses associated with the event
- Set event revenue goal and watch the actual results dynamically update
- Access a wide variety of Event reports
- Upload relevant documents
- Integration with Event Registration Web Forms

## Memberships

If you are a membership-based organization, Eleo can help you maintain up-to-date membership information and generate accurate, efficient member communication.

- Easily create and label memberships

## Memberships (continued)

- Create membership levels
- Assign membership tenure
- Sign up contacts to memberships
- Record membership level within contact
- Accept and record payment of memberships
- Track all transactions and acknowledgements of payments
- Record up and down movements within membership types
- Print membership cards
- Generate expiration, renewal, and payment reminders
- Create lists, letters, emails, and more for renewals or other communications
- Establish renewal timeframe rules: annual, anniversary, etc.
- Access a wide variety of Membership reports

## Volunteers

Volunteers are the heart and soul of nonprofits, generously giving of their talent, expertise, and precious time to further the goals of an organization and a cause they believe in. Eleo Online Donor Management Software helps you capture information about the skills, knowledge, and availability of your current and potential volunteers and track their hours and activities—so you can maximize their impact and acknowledge the important contributions they make to your organization.

- Manage and track volunteer activities
- Create volunteer opportunities, with a full range of information including job description, job skills needed, logistics (date, place, time, etc.) , and number of volunteers needed
- Identify contacts as volunteers
- Assign volunteers to open volunteer jobs and track volunteer hours
- Track volunteer day and time availability, interests and skills, type and status
- View volunteer hours automatically updated in the contact record
- Create and manage volunteer communications
- Track your volunteer training, orientation, and background checks
- Access a wide variety of Volunteer reports

## Grant Management

Grants are important to the funding of your organization. Grants support your cause and the work you do. Tracking tasks related to the grant application and the reporting requirements of your Grantor, requires organization. That is where Eleo Grant Management comes in. Eleo allows you to manage both the grant application process, as well as, the reporting of milestones and outcomes required by your Grantor.

With Eleo Grant Management you can:

- Enter and create a unique tracking file for each grant
- Record all relevant grant information, such as contact information, descriptions, award amounts and deadlines.
- Tasks - track grant application tasks with descriptions, due dates and completions

## Grant Management Continued

- Milestones – track grant operational Milestones and Outcomes with descriptions, due dates and completions
- Award amounts and receipt – track grant awards broken down by due date and requirements
- Expenses – track expenses, vendor, amount and description
- Documents – upload relevant documents
- Reports – produce reports of the various elements of your grant(s) on screen, print, Excel or PDF

Eleo Grant Management provides you one place to record all the elements of your grant application process, right alongside your donor information and fundraising activities. Eleo Grant Management is included and available for use at every level of Eleo's monthly subscriptions.

## Web forms and Online Donations

In today's high-tech world, we know your nonprofit needs to connect with donors and supporters online in an effective and efficient way. A key component to your fundraising is giving your constituents an easy way to support your cause. With Eleo's custom web forms, you can create your own online donation page, contact form and event registration - uploading them seamlessly to your website. And since these forms integrate directly with your Eleo database, there is no double entry.

- Create multiple custom web forms – contact and donation
- Standalone and embedded webpage options
- Link to page or button option
- Design custom header and footer
- Design options for font, font size and color
- Multiple text field options
- Defined Section Header field option
- Built-in confirmation page
- Automated email confirmation
- Blind copy of automated email
- Complete web link created with form
- Review all transactions prior to processing into contact record
- Event Registration Form seamlessly enters information in to Eleo's Event Module and Donor Record

Eleo offers multiple payment processing options to provide you with a fast, easy and secure way to accept payments online. These low-cost options have no monthly fees or early termination fees. Learn more about [Stripe](#).

## Software Integrations

Eleo offers direct integration with **QuickBooks Online**. This allows you to eliminate double entry of recording gifts, donations, sponsorships and other payments to your nonprofit in both your Eleo database and Quick Books.

Eleo offers direct integration with **MailChimp** and **Constant Contact**. Eleo integrates with email providers to help streamline your email communications to your donors and supporters, while recording communication results directly into your Eleo database. And Eleo integrates with Microsoft Word for mail merged letters.

Eleo's integration with **Avery Labels** gives you the ability to create custom designed labels for thank you letters, event invitations, appeal letters and more.

Eleo's Task and Calendar integrates with Google Calendar through the individual user's profile. This allows you to share your Eleo calendar with others (not using Eleo) and receive automated reminders on your scheduled tasks.

### Security, Back-up, and User Rights

Your trust in Eleo is of utmost importance to us. We stand committed to keeping your information safe and secure, while providing flexible access to our software. Our infrastructure resides on Microsoft's Azure cloud services which constantly upgrades their services to protect your data from unauthorized access, corruption and environmental threats. See our Security Document for more information.

- Microsoft's Azure cloud infrastructure
- Firewall and physical security
- Antivirus/Antimalware protection
- SSL and encryption
- Automatic backup
- Authorized access validation and false attempt logout
- User rights

### Customizable Homepage

Eleo's Homepage is easily customizable, so you can decide what information is most valuable for you to see right away—and so you can focus on what is most relevant to your fundraising needs at any given time. Each Eleo user can design their homepage with different options and arrangement of the information.

Select what appears on your homepage:

- Task List and Calendar
- Recent Contacts viewed
- Recent gifts entered
- Thank you letters and receipts to be processed
- Fundraising totals with graphs
- List of Top Donors and Top Donations by date range
- Favorite Reports
- And more