



Customer Relationship Management (CRM)

EASY DASHBOARDS

Customizable dashboards and constituent bio tabs place everything you need on one screen. Your staff and volunteers don't need to navigate through countless windows to perform their tasks. Custom "apps" can be created to display information the way you want.

COMMUNICATION LOGS

Relationships are built through repeated communications. Andar lets you track communications from any of the constituents involved.

NOTES AND ATTRIBUTES

Biographical and other notes with pictures can be stored with constituents and displayed on dashboards and bio tabs.

MSOUTLOOK INTEGRATION

Track e-mails received and sent through Outlook with a single click. Predefined templates can be used to quickly send personalized and branded e-mails to constituents. Your Outlook contacts and tasks are automatically kept up-to-date by Andar.

MARKETING & COMMUNICATIONS

Andar's communication engine takes care of branding your web site, e-mails, Thank You letters and other documents. It also ensures that up-to-date and personalized messaging is automatically delivered through all communication channels.

LOANED EXECUTIVES

From a single dashboard, LEs can manage their accounts and their solicitation process. See Mobile Access below.

MOBILE ACCESS

Staff and volunteers can access constituent information using smartphones (iPhones, iPads, Androids, Blackberries, and other web enabled handheld devices).

EXECUTIVE DASHBOARDS

Andar dashboard "apps" are designed for executives to oversee staff performance and manage issues before they become critical.

LEADERSHIP GIVING

Large donors within companies have complex relationships with your organization. Andar lets you organize your communication plans and manage your relationships in conjunction with workplace giving.

MAJOR GIFTS

Major gifts are cultivated over many years. Andar lets you monitor your long-term "Moves Management"™ process. Your constituent's linkage, ability, and interests are systematically rated and used to guide your solicitation activities.

PLANNED GIVING

This form of Major Gift consists of "Expectancy Gift" tracking separate from the financial engine of Andar. All documents involved can be attached to the gift.

GIFT TRACKING

Rapid and easy entry of "leadership" gifts allow larger donors to be recognized and thanked quickly. Goals, projections and verbal commitments can be entered for individuals and companies.

MAPS AND DIRECTIONS

Andar gives you one-click access to maps and driving directions right from your constituent profiles.

TELEPHONY INTEGRATION

Incoming telephone calls can automatically pop-up in your constituent's profile. You can also dial your constituent's telephone number with a single click. (Your telephone system must provide support for this feature.)

CEO CALL REPORTS

Company profile bio tabs can include graphics and be printed in various formats to generate highly professional looking reports used during your CEO Calls.

CONSTITUENT PROFILE REPORTS

Like CEO Call Reports, customized individual constituent profile bio tabs can also be printed.

WORKFLOWS

Andar lets you define and automate the tasks of your business processes. Each task can depend on the completion of one or more other tasks. Each task can be assigned to different staff members.

MOVES MANAGEMENT

Define a prospect code for each of your prospecting activities (planned gift, major gift, board member, volunteer, etc.) Each prospect code has its own move states, linkage, ability, and interests. Cultivation quota is automatically calculated. Probabilities can be specific to each move state or manually overridden. All touches are rated and used to direct next-steps.

ANALYTICS

Third-party prospect research results can be uploaded into Andar and then data mined or placed on constituent profile bio tabs.



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