

Managing Acquisitions, Stewardship, and Development Programs with One, User-Friendly Database



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Introduction to CiviCRM: An Open Source Solution

CiviCRM is an open source constituent relationship management solution. CiviCRM is web-based and designed specifically to meet the needs of advocacy, non-profit and non-governmental groups.

CiviCRM is a powerful contact and fundraising system that allows you to record and manage information about your various constituents including volunteers, activists, donors, employees, clients, vendors, etc. Track and execute donations, transactions, conversations, events or any type of correspondence with each constituent and store it all in one, easily accessible and manageable source.

CiviCRM is created by an open source community coordinated by CiviCRM LLC, and the 501(c)(3) non-profit Social Source Foundation.

WHY USE CIVICRM?

- CiviCRM is free 'as in freedom' software, so you and your organization can finally be in full control of your own data and communications.
- Unified view of every constituent. Store information about individuals, organizations and households and your interactions with them.
- Strong open source community. A rapidly growing open source community of developers, consulting firms, consultants and others support, extend and maintain the software.
- Designed for the civic sector. CiviCRM was designed from the ground up for non-governmental organizations that engage in non-profit work.
- Seamless integration with web sites. CiviCRM integrates directly into the popular open source Content Management systems - Drupal and Joomla!. Registration and visitor interactions are logged directly into the system.
- Open source & open standards. Users can make any modification to the software, can benefit from modifications made by others and can effectively interoperate with other applications.
- Affordable and cost effective. CiviCRM is available without a license fee and is supported by a community of nonprofit-focused consultants. Costs are limited to development, hosting, and maintenance.
- Optional components like CiviContribute, CiviEvent, CiviMail, and CiviMember give you more ways to connect with and engage your supporters.

KEY FEATURES IN DETAIL

- **Segmentation Tools.** Use groups, simple and searchable tags, and/or relationships to segment constituents.
- **Extensive Configurability.** CiviCRM is highly configurable, allowing you, in most cases, to configure it to work with your existing business processes. Unlimited locations, addresses, phone numbers, emails and custom data fields allow most unique needs to be met.
- **Contacts.** Store common nonprofit contact data (individuals, organizations, and households) that support donor management, case management, voter, and advocacy applications.
- **Relationships.** Understand the relationships between any two contacts with standard (volunteer, employer, head of household) relationships or create your own unique custom relationship types.
- **Activities.** Record standard activities (phone call, meeting, email) for any contact or create your own custom activities that meet your needs.
- **Smart Groups.** Create smart groups based on any search criteria or create standard groups that are simply lists of contacts. The membership of a smart group changes automatically according to that moment's search results.
- **Custom Data.** Create unlimited custom data fields in virtually any format, including radio buttons, drop-down menus, etc. All custom fields are searchable and can define a smart group.
- **Import and Export Functionality with De-duping.** Import functionality intelligently maps CiviCRM fields to imported data and checks for duplicates based on user-defined criteria.
- **Permissions.** With Drupal integration, access to certain groups of contacts can be limited to specific users, offering a way for volunteers to manage small portions of a larger CiviCRM database.
- **Website Integration.** CiviCRM is integrated with both Drupal and Joomla/Mambo. Web site registrations automatically become CiviCRM records and individuals can maintain their own CRM record.
- **Application Programming Interface (API).** CiviCRM offers a fully documented API exposing all major functionality. For instance, you can search the database, register interactions with constituents, create or update contact information, etc. This allows CiviCRM to realistically be a central repository of virtually any nonprofit's CRM information.