MULTI-CHANNEL REVENUE
WORK & INFORMATION CENTERS
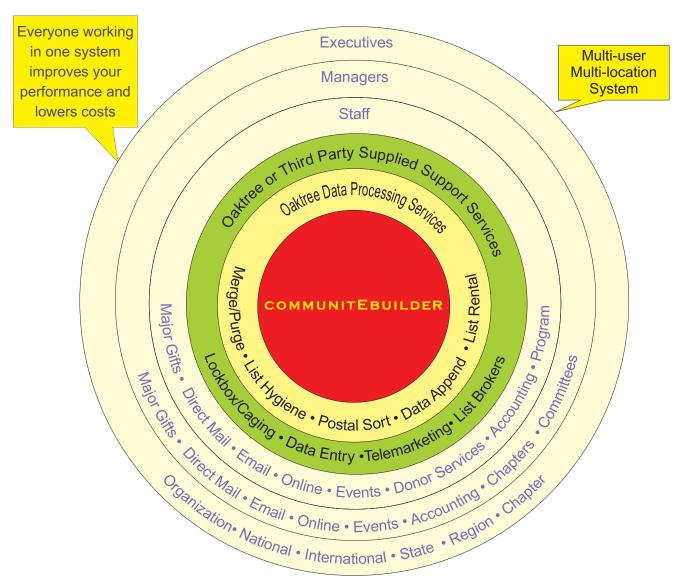

DATA & SUPPORT SERVICES

COMMUNITEBUILDER is the most advanced work and information center available to nonprofit organizations today. It enables nonprofits to:

- Manage all revenue channels in a single system that replaces multiple databases & CRM software providing more features, versatility & control
- Provide all revenue generating employees all the working tools they are used to having with more features, in a system that is easier to use
- Coordinate your entire revenue generating staff and their activities
- Increase donations and gifts through increased efficiency and productivity
- Increase revenue available for programs by eliminating waste, reducing duplication of effort, and reducing the cost of development

Everyone working in one system improves your performance and lowers costs

Multi-user Multi-location System

Executives

Managers

Staff

Oaktree or Third Party Supplied Support Services

Oaktree Data Processing Services

COMMUNITEBUILDER

Merge/Purge • List Hygiene • Postal Sort • Data Append • List Rental

Lockbox/Caging • Data Entry •Telemarketing• List Brokers

Major Gifts • Direct Mail • Email • Online • Events • Donor Services • Accounting • Chapters • Committees • Program

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Organization• National • International • State • Region • Chapter

ABOUT OAKTREE SYSTEMS

We have been serving nonprofits with leading edge CRM/databases and back-end support services since 1982. Since 1997 we have been delivering our services over the Web as an ASP. This is our 7th generation system for nonprofits overall and our 2nd multi-channel system.

COMMUNITEBUILDER

Integrated multi-channel marketing is the strategy being embraced by the most successful nonprofit organizations today.

Often developing the strategy is easy, but the execution is difficult. Without an effective system that enables you to manage all those channels simultaneously, you will never be able to achieve the results you are seeking.

Coordination is a major issue. You have wonderful, dedicated staff working on major gifts, grants, direct mail, email, online donations and events to build revenue for your organization. Each group however, has different goals and needs, and sometimes their efforts overlap. This is because they are working with data that they believe is unique to them but is actually duplicated in part with data owned by other groups. Too much data into many places

Now there is a solution from an innovative company that has been serving nonprofit organizations successfully for twenty-five years:

COMMUNITEBUILDER

This is our 7th generation product for nonprofits and our 2nd generation multi-channel system. Do not confuse it with a typical database or packaged software because it is neither. It is a leading edge work and information center that marries a sophisticated CRM system to an advanced database. This allows everyone in your organization to work effectively in the same work center with the same data at the same time.

Revenue Channels

COMMUNITEBUILDER- supports development and tracks revenue from the following sources:
- Auctions
- Bequests
- Corporate gifts
- Dances
- Dinners
- Direct mail
- Ecommerce
- Email
- Foundation grants
- Government grants
- Honoraria
- Matched gifts
- Memorials
- Online donations
- Phone
- Planned giving
- Pledges
- Product sales
- Restricted gifts
- Runs/walks/bike/athletic events
- Third party gifts
  ...Just about any type of revenue

COMMUNITEBUILDER:

- *Easy to use*
- *Completely secure*
- *Highly flexible*
- *Accessible from anywhere*
- *Easy to maintain*
- *Easy to manipulate and append data*
- *Easy to generate your own lists, reports, and queries*
- *Easy on the budget with affordable "no surprise" price plans*
- *Zero downtime conversion policy*

How It Works

communitEbuilder is built on the ASP (application service provider) model. Your data is hosted on our high performance servers which you and your staff access through a secure internet connection, from anywhere in the world.

The CRM functions and the database are completely integrated in the system. There are no other software programs or databases required. There is no special hardware to buy and no special technical experience required to use the system. It is in fact easy to use and intuitive.

All the data from your current CRM software and database(s) are converted into the system. Each set of data is formatted so every classification and category matches up and all the original information is retained. We configure the system to use your terminology and reporting formats.

Every user has a unique ID and password. You determine rights and security levels. This includes vendors like list brokers, telemarketers, lockbox/caging, data entry and agencies. **communitEbuilder** supports remote users as well as onsite with the same functionality. This is a distinct advantage for organizations with multiple sites, multiple users, and staff that travels.

During conversion, you continue to work on your existing systems so there is zero downtime time. Once the system is configured to your specifications we train your staff - a short process with this intuitive system, and finish the conversion. We do the final conversion over a weekend so it does not impact your operation and you are up on Monday morning. You have a single point of contact to help you every day. If you have turnover, our staff can help fill in until you make a new hire.

Customization

Since every nonprofit organization has some unique characteristics, we do not believe in one size fits all. That makes us unique from our competitors and more valuable to our clients. This applies to both the individual configuration of the system to the clients specifications and the development of custom modules

communitEbuilder is designed to be quickly and easily customized. We also have a number of semi-custom pre-designed modules that we can deploy immediately. Do you require a registry, memorial, product sales website with inventory management, online donation page, walk, run, bike, cruise or other special module? We can readily provide it for you.

About Oaktree's Model

1) We have been servicing nonprofits with powerful, high performance systems since 1982.
2) Clients know their needs best. They tell us what they want & we develop solutions.
3) Our client service staffers are experts in the field. They support and consult clients daily.
4) There is no software or hardware to buy, or license. Updates are done on our end requiring no action on your end. In fact no technical training is required to use the system at all.
5) If you have any turnover, our client staff will help fill in so you don't skip a beat. Training is easy and we regularly train new staffers, or if you desire, you can do it.
6) We dislike surprises so our pricing system is affordable and predictable.
7) Our system is flexible, and scalable, managing files of 15,000 to 10+ million records.

COMMUNITEBUILDER

Features

communitEbuilder has literally hundreds of features designed to enrich its value while making it easy to use. These are just a few:

- Acknowledgements
- Advocacy
- Alternate indexes
- Alerts
- Attach emails to records
- Attach files to records
- Automatic address validation
- Automatic change update log
- Chapter management
- Committees
- Communications
- Comprehensive campaign management
- Corporate/organization links
- Credit card processing
- Custom fields
- Custom reports
- Dashboard
- Data append
- Demographic data
- Email
- Exportable queries
- Exportable reports
- GL code designation
- GL export
- Household info
- Individual, XML and batch data entry
- Individual links
- Interests and activities
- List management
- Low inventory alert
- Marketing flags
- Matching gifts
- Membership
- Moves management
- Multi chapter
- Multi location
- Multi set List selection
- Multi user
- Multiple addresses
- Multiple manual and automated de-duping modes
- Multiple salutations
- Notes
- Online donation
- Online payment
- Online registrations
- Order processing
- Original list sourcing
- Pick and ship orders and labels
- Powerful integrated report and query engines
- Product inventory
- Quick and advanced search modes
- Real-time system entry, queries and reporting
- Relationships
- Reminders
- Seasonal addresses
- Standard reports
- Task lists
- Ticklers
- Unlimited contact info
- Unlimited financial history
- User definable features
- Vendor accessible
- Volunteer tracking

TECHNICAL INFORMATION:

This is an object oriented system written in .NET and built on an MS-SQL platform. It's multi-tiered architecture has an advanced DALC layer for optimized speed. The friendly user interface was developed using AJAX technology. Infinitely scalable the system is easily configured to individual clients.

It has a number of standard vertical modules like online donations, events, etc., but is built to be easily customized with user defined modules.

The powerful reporting and query engines are integrated and offer limitless combinations of sets. Custom reports are available and queries can be stored for reuse and updating

Everyone who is involved in donations, gifts or revenue can now work with the same data. They will also have more tools and features than they ever thought possible to help them improve your organization's performance.

ECOMMERCE

COMMUNITEBUILDER supports all our clients marketing programs including ecommerce. Our ecommerce solution goes well beyond the customer focused web-site. We do all the back-end processing necessary to build a successful web-based marketing plan.

Email

Database segmentation can be used to generate regular e-mail promotions to all of our clients customers within the **COMMUNITEBUILDER** system. Each client has the ability to identify the number of donors on the system with email addresses and to segment the list by any number of preferred characteristics. This selection data is recorded by the system enabling reuse at any time and to prevent list fatigue.

Website Development

Oaktree offers a full set of in-house services to build a database oriented ecommerce web site. We also offer a full range of hosting options.

Order Processing

Our ecommerce order capture system is tied directly to your real-time database and allows our clients to deal with customers professionally and accurately. A complete Web-based system supporting mail, fax, phone or online ordering is utilized including these features:

- Comprehensive pricing and premium functionality
- Gift order processing
- Automated cross promotion capabilities
- Utilizes extensive promotion and finder key codes
- Flexible shipping options
- Email order confirmation
- Inventory management
- Low inventory alerts

Credit Card Processing

We offer processing and reconciliation for online donations and product purchases. Payments are tied to an acknowledgment function and in the case of product orders our systems are integrated to insure that customers are not billed until shipments are executed.

A full set of reports track multiple types of credit cards and the status of each order's credit card information. All credit card information is encrypted and eventually deleted when the credit card verification is completed successfully.

DATA PROCESSING

We offer complete data processing services including List Hygiene, Merge/Purge and Postal Sort functions that utilize the latest industry technology to save you time and money.

Address Hygiene

Oaktree Systems helps you go to market with the cleanest lists possible. Our unique Address Hygiene System is designed to reduce your total undeliverable mail. which saves you money and increases your total number of responses. Our standard processing includes: address correction and standardization; ZIP+4 coding; National Change of Address (NCOA) processing; Delivery Sequence File (DSF); Locatable Address Conversion System (LACS).

Merge/Purge

Identifying duplicates is one of the easiest ways to reduce in-the-mail costs. Oaktree Systems provides low-cost, highly customizable, fast merge/purge processing. Unique features and quality controls:

- Verify quantities for each file received
- Verify data fields for each file received
- Use of CASS certification to verify reliability of files
- Segment, split, Nth and drop records using any combination of available variables
- Mix business and consumer addresses in the same processing sequence
- Carry out list priorities
- Customize matching logic for each list within the merge
- Verify zip score modeling
- Research lists of names never to be mailed
- Create detailed merge/purge and package code reports to provide statistics on outgoing files
- Omit records using DMA Pander, Social Security deceased file and your own suppression files

Postal Presort

- Postal automation
- Multiple version or editions
- Destination entry at multiple facilities
- Multi-line address parsing
- Firm bundling
- Segmented mailings

LIST RENTAL

Web-based Management

Oaktree has completely automated the List Rental management business. Every step of the process; list counts, order submission, order tracking and order fulfillment is managed on a common web site. List Owners, List Buyers and List Brokers interact in an efficient and cost effective manner.

Real-Time List Statistics

Our database allows List Brokers the ability to quickly define selection criteria and get count results in seconds. Queries of List exceeding 5,000,000 names all give results in under 20 seconds List selection criteria are extensive.

List Processing

Oaktree's web-based order database allows users to enter and reuse mailer and vendor information over and over. This speeds up the process of submitting order and insures rapid and accurate fulfillment. The database also provides a full history of all previous orders and has an automated order report for billing and tracking.

Email Alerts

When an order is entered, a series of email alerts are triggered during each phase of production. Alerts are transmitted to user specified email addresses for new orders, order released, order approved, and order shipped

Order Fulfillment & Tracking

A comprehensive Order tracking and Fulfillment system is available to track orders by mailer, product type, date, and quantity mailed. A queue of pending orders and their current status is always displayed upon entry into the tracking module.