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

![Direct project cost by donor](image)

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 creation and review](image)

*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.

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

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.”


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.