

FEATURES

Manage an UNLIMITED number of donors, volunteers, and members	✓	✓	✓	✓
Coordinate campaigns while tracking designated funds, payment plans, and solicitors	✓	✓	✓	✓
Analyze data with off-the-shelf reports and flexible reporting tool	✓	✓	✓	✓
Manage memberships including rosters, dues, and levels		✓	✓	✓
Track volunteer hours		✓	✓	✓
Organize events while recording registrations, payments, and event details		✓	✓	✓
Manage email campaigns with Constant Contact integration		✓	✓	✓
Assess capacity to give with WealthEngine integration (see support section for details)		✓	✓	✓

ACCESS

Installed locally, one workstation	✓	✓		
Installed locally, multiple connected workstations			✓	
Hosted online, available anywhere				✓

PRICING

Initial license – ONE TIME COST	\$199	\$349	\$349	
Each additional license – ONE TIME COST			\$300	
Yearly subscription, 2 users (Premium Only)				\$874
Yearly subscription, each additional user (Premium Only)				\$775

ADD-ONS

Land Trust property manager - manage property attributes, staff and steward information, and visit details – ONE TIME COST		\$199 / license	\$199 / license	✓
Remote Volunteer – your staff and volunteers can submit hours and comments remotely		\$99 / year \$100 setup	\$99 / year \$100 setup	\$99 / year \$100 setup
Volunteer Registration – volunteers can register for available shifts		\$99 / year \$100 setup	\$99 / year \$100 setup	\$99 / year \$100 setup

SUPPORT

Data importing				
System installation and setup				
Training				
Phone and email support				
Customized reporting				
WealthEngine prospecting data				
Tech support				

**SEE NEXT PAGE
FOR SUPPORT
OPTIONS**

SUPPORT PACKAGES

STARTER SUBSCRIPTION

\$49 / month
or
\$499 / year

- ✓ 12 month subscription
- ✓ Upgrade to future versions, when released
- ✓ Custom reporting
- ✓ Unlimited phone and video training sessions
- ✓ Discounted tech support
- ✓ First 75 prospect searches with WealthEngine (additional available for purchase)

PLUS SUBSCRIPTION

\$99 / month
or
\$1069 / year

- ✓ 12 month subscription
- ✓ Upgrade to future versions, when released
- ✓ Custom reporting
- ✓ Unlimited phone and video training sessions
- ✓ Unlimited tech support
- ✓ First 150 prospect searches with WealthEngine (additional available for purchase)

MAX SUBSCRIPTION

\$129 / month
or
\$1399 / year

- ✓ 12 month subscription
- ✓ Upgrade to future versions, when released
- ✓ Custom reporting
- ✓ Unlimited phone and video training sessions
- ✓ Unlimited tech support
- ✓ First 1000 prospect searches with WealthEngine (additional available for purchase)
- ✓ Annual in-person training session

HOURLY – PER INCIDENT

\$149 / hour

- ✓ No subscription
- ✓ Discounted upgrade to future versions, when released
- ✓ Custom reporting provided after approved estimate
- ✓ Tech support provided after approved estimate
- ✓ 2 free training sessions every 12 months
- ✓ Prospect searches with WealthEngine available for purchase
- ✓ Services provided as needed – no minimum purchase, no balance to maintain

HOURLY – PREPAID

\$95 / hour

- ✓ No subscription
- ✓ Discounted upgrade to future versions, when released
- ✓ Custom reporting provided after approved estimate
- ✓ Tech support provided after approved estimate
- ✓ 2 free training sessions with every block purchase
- ✓ Prospect searches with WealthEngine available for purchase
- ✓ 4 hour min. purchase – never expires

**Hourly – Per Incident available to Light and Basic customers immediately. Available to Premium and Advanced customers after 12 months.*

***System setup and data import, initial training sessions, and access to off-the-shelf reports included with all packages*