



## thankQ crm

The thankQ CRM module sits at the heart of your database, providing the tools to ensure that you make the most of every single relationship your organisation has – whether it's with a supporter or member, a volunteer or a supplier. Extensions can be selected for the CRM module, providing extra functionality to manage:

- membership
- alumni
- volunteers
- VIPs
- Committees

### a 360° view of each contact

The key to developing successful relationships is making sure your contacts feel that you truly know them. The Contacts form provides a complete overview of every relationship, organised into tabs showing communications, interests, donations, events and much more. Greater detail is available at the click of a button allowing you to drill down.

**Contacts**

Serial No 000001 Contact Type Individual Primary Category Potential N

Title Miss

First Name Sally Other Initials

Key Name Turner Post Nominal

Prospect Prospect History Control Table View

Addresses @ographical Profile Mailing Preferences Communication Groups Fundraising Income

RFM No	278	Last Date	01-Sep-2008	No of Amounts	100	Total	4299.95
RFM Text	AAA	First Date	01-Nov-1997	Max Amount	200.00	Average	43.00

Has Legacy  Has Soft Creditors  Default to Anonymous GAD / Ts

**Fundraising Summary**

Year	Currency	Count	Total Income	Net Income	Tax Income
2009	GBP	5	50.00	50.00	0.00

### making the most of your relationships

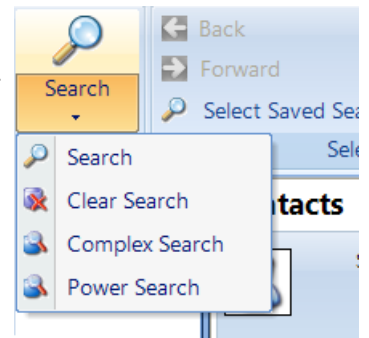
The problem facing many organisations is that employees hold onto their 'own' information and do not use a centralised system. thankQ users quickly realise the benefits of pooling their data and it soon becomes an essential daily tool – an organisational address book and communication log.

Once everyone is pouring their knowledge into the system, you quickly establish the ability to discover what you didn't know. The relationship tree allows you to see 'who knows who' and you start to make sure that you know which people should talk to which contact.

### searching

thankQ searching is one of its most powerful features. A choice of techniques meets the needs of users ranging from those with basic requirements to the most sophisticated, quickly displaying the records they need, searching across all classes of information.

Fuzzy searching options mean thankQ even helps users when they spell things wrong!



### personalised for you

When you expect your staff to use a system every day it needs to work with them. That's why thankQ allows users to choose which tabs of information they see; fields can be added or renamed using your organisation's terminology and contacts can be arranged into static lists and 'logical' selections.

### quality and security of your data

Once you've got a good database it is crucial that you look after it. thankQ offers a range of de-duplication rules to ensure contacts are not repeated. For a greater level of record management, you can choose to switch on audit trails tracking who has made changes to the data, or record ownership that restricts who can see or edit a specific record.

thankQ addresses data protection concerns, including data reports for contacts and options to manage TPS / FPS indicators and 3<sup>rd</sup> data party sharing.