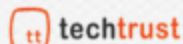


# A guide to some of the leading CRM systems for small + medium charities



	General CRM systems			Donor management systems		
<b>SET-UP</b>	<p>Apply a general charity template called the Nonprofit Success Pack designed for a non-profit environment.</p> <p>Can also be customised for a specific set-up with the help of a Salesforce certified consultant.</p>	<p>Can be customised for a specific non-profit environment with the help of a certified Zoho consultant.</p>	<p>Can be tailored to your specific processes and environment, but will require a third-party tool or custom integration.</p> <p>You need an Office 365 account to get started.</p>	<p>Comes with built-in tools to support fundraising and donor management initiatives like online fundraising, donor engagement, fundraising events, donor retention and more.</p>	<p>Comes out of the box with features for non-profits like fundraising, event management, online donations and payment processing.</p>	<p>Open-source software, so anyone can download and modify the source code to their specific set-up.</p> <p>This will require either development experience or working with a development and deployment partner.</p>
<b>CHARITY PRICING</b>	<p>Through the Salesforce 'Power of Us' donation and discount programme, qualified charities can get the first ten licenses free, and steep discounts on all future licenses and subscriptions (up to 50%).</p>	<p>Zoho has an entirely free version for up to three users.</p> <p>For more than three users, the company says it offers special discounts for non-profits by contacting their sales department.</p>	<p>User CALs (Client Access Licenses) are available as donated products for charities on IT-exchange.</p>	<p>Prices start at £69 a month for your first 1,000 records (add 1,000 records for an extra £23 a month). The next price band up is £129 a month for 2,500 records.</p>	<p>Pricing plans start at £99 a month for up to 1,000 records, and £185 a month for 5,000 records.</p>	<p>Free! No license costs or user fees, but you pay for development and hosting.</p>
<b>CLOUD OR ON-PREM?</b>	<p>Salesforce is exclusively hosted in the cloud.</p>	<p>Zoho is exclusively hosted in the cloud.</p>	<p>Microsoft Dynamics can be run in the cloud or on Windows Server.</p>	<p>DonorPerfect can be run from the cloud or on-premises.</p>	<p>eTapestry is exclusively hosted in the cloud.</p>	<p>CiviCRM is self-hosted. They have recently introduced a lightweight, hosted version (CiviCRM Spark)</p>
<b>INTEGRATION</b>	<p>Connect your legacy systems (and data from external sources) through Salesforce Connect, and integrate your existing apps through a huge number of integration tools and APIs.</p>	<p>Zoho integrates with many Google Apps and syncs with QuickBooks and Microsoft Outlook.</p>	<p>Microsoft Dynamics can be integrated with Office 365 - a cloud service that includes Microsoft Exchange Server, SharePoint, Skype for Business and Microsoft Office.</p>	<p>Integrates with apps including Intuit Quickbooks and Microsoft Office.</p>	<p>Integrates with Outlook, and can be integrated with nearly any other system via APIs (requires custom programming).</p>	<p>On your website CiviCRM integrates with Drupal, Joomla and WordPress, as well as a long list of application integrations and extensions.</p>
<b>USER PERMISSIONS</b>	<p>Salesforce provides a layered data sharing design that allows you to expose different data sets to different sets of users and set many different sharing rules at different levels.</p>	<p>Provides a set of security features that defines permission to data and features of the CRM. Administrators control these security options in the organisation's account.</p>	<p>Dynamics 365 has eight different record-level privileges that determine the level of access a user has to a specific record or record type.</p>	<p>Control which individual has access to which data, or the Groups tab allows you easily group users together to assign the same permissions to multiple people without having to change them for each individual use.</p>	<p>eTapestry allows Administrator users to set up various security groups with rights to perform certain actions in the database.</p>	<p>Permissioning in CiviCRM can be set up through the content management system on your website or in CiviCRM itself for more granular control.</p>
<b>SUPPORT</b>	<p>In place of customer service, Salesforce runs online resources and help forums staffed by its extensive community of customers and partners, with specific user groups for non-profits.</p>	<p>Zoho provides email and telephone technical support within business hours, with telephone support for paid customers online.</p>	<p>There are a variety of support options depending on whether you are using a cloud hosted or on-premises version of Dynamics 365.</p>	<p>DonorPerfect customers get access to live online support, resource centre and an online client community. You can get access to email and telephone support for an extra £39 a month.</p>	<p>All eTapestry customers get an online resource hub, chat, and email support.</p> <p>Phone support does not come as standard with all eTapestry packages.</p>	<p>There are a variety of online resources, professional consultants and support services available for CiviCRM (but no centralised technical support).</p>