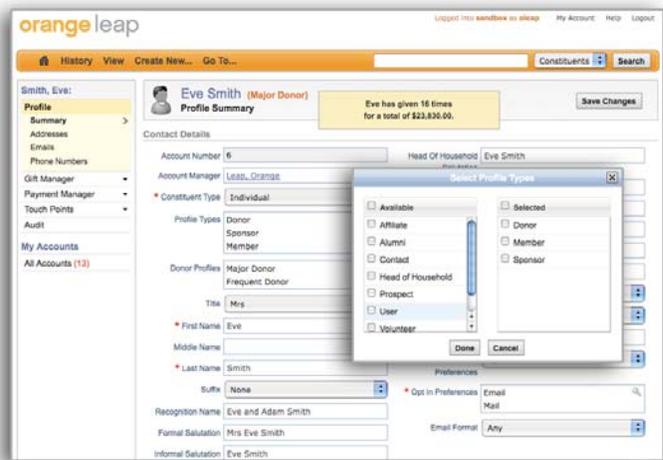# Orange Leap – Product Overview

orange leap

Where nonprofits rise and shine

Orange Leap is a unique on-demand, web-based constituent and donation management solution for today's nonprofits. No longer do you need to rely on individuals to remember your processes, let your solution do the work! With an intuitive, simplistic approach to even the most complicated tasks, it's easy to get up and running quickly. By allowing you to adapt your installation to meet your needs, you are not bound by the rules, requirements, and processes of what others have implemented. The platform's flexibility allows your solution installation to change as you change - in hours, not months!

Constituent Profile Personalization

Out-of-the-box, Orange Leap defines constituents under two types: individual or organization. Each constituent type has their own defined profiles such as donor, volunteer, sponsor, foundation, member, alumni etc. Constituents can have multiple profile types simultaneously (ex. donor and volunteer), and donor profiles may be further refined to identify them as a major donor, frequent donor, first time donor, etc. In addition, these profiles can be assigned automatically based on the criteria you outline in your business rules. By associating profiles, constituent reporting and

segmentations become much easier. You no longer need to evaluate whether a gift was given – you can just search on all donors or on all first-time donors. If you need to track other profiles to improve your reporting even further, changing and modifying the profiles is in the control of your administrators – not us!

Multi-Relationship 'Householding'

Powerful relationship capabilities allow you to maintain a multitude of relationships between constituents – whether it is maintaining household members and their head of household and family relationships, an organization's internal hierarchy, or and individual's circle of friends – all can be easily maintained to assist with your segmentation and campaign needs.

Feature Matrix

Features	Orange Leap™
Constituent Profile Personalization	✓
Multi-Relationship 'Householding'	✓
Flexible Contact Manager	✓
Correspondence and Payment History	✓
Plain-language, Automated Business Rules	✓
Add, Hide or Change Screens or Fields	✓
All Deployment Services Included	✓
Overall Cost	$

Plain-Language, Automated Business Rules

Business rules will assist you in automating many cumbersome and tedious processes that currently require significant staff time and multiple manual reports, queries and actions. Business rules allow Orange Leap to instantly identify what type of donor a constituent is (e.g. Major Donor, Frequent Donor, First Time Donor, etc.) based on your definitions and segmentations. It will then initiate the appropriate communications to send them (e.g Welcome Letter, Tax Receipt) in the format that they prefer (e.g. email, mail). Business rules also allow you to invoke other requirements that you may have when inputting and managing information. The applications are limited only by your creativity, but could include real-time duplicate checks at every data input point. Finally, business rules can be used to execute mass or bulk updates. For example, you can create a business rule that changes the account manager should someone leave the organization. You can define the constituents that meet the criteria for the change (e.g. all constituents who currently are assigned the account manager of Eve Smith) and then execute the appropriate change (e.g. all constituents assigned to Eve Smith whose primary residence is in Texas, assign to Paul Johnson. For all other constituents assigned to Eve Smith, assign to Janice Colt).

Easy to Learn

Our user interface and layout make it easy for you to quickly get to the information that you are looking for, or quickly input or update existing data such as a gift, address, or payment. Context-appropriate navigation and our picklists and code administration, means that what used to take you four or five steps, can now be done in two or less. Terminology is easy to understand, and it can even be changed to match the terminology you use.

Adapting your Solution

Many on-demand solutions limit customizations customers can implement. With Orange Leap, you can:

   * Modify, rename, or hide any screen or field
   * Determine what data you want to input and how it should display
   * Apply your own business rules that support your processes and workflow needs – as they are today and as they change in the future.

All changes are unique to you and will be maintained, regardless of any upgrades being applied.

Our team will work with you to adapt your installation with the business process rules you need to start with. But, if they change, the time to incorporate those changes is not weeks - it's a day or less.
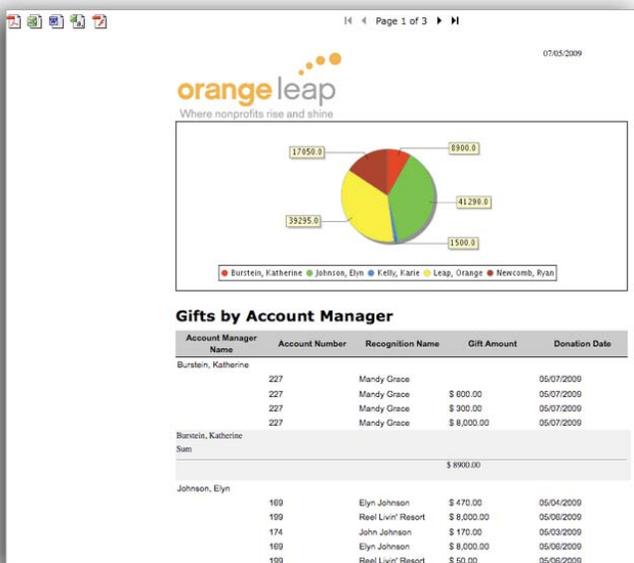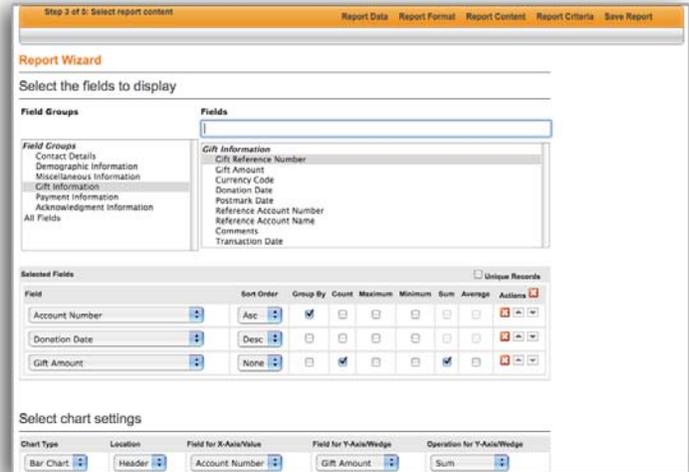
Permissions and Security

Each named user can have different types of permissions that identify what information, whether they be entire screens that they can access, or just a defined set of fields on those screens. Users may also be set up to access the reporting solution, only; better yet – you can send scheduled reports to anyone, regardless of whether they are a named user or not.

Flexible Contact Manager

Multiple permanent, temporary, and seasonal address, email, and phone contacts allow you to know how to contact your constituents at any point in time. Being able to maintain how your constituents want to receive correspondence allows you to focus your campaigns and avoid the issues and embarrassment associated with calling or emailing someone who has opted-out of those communications or requested use of a different address.

Correspondence and Payment History

Our touchpoints section allows you to maintain a list of communications and additional notes associated with any constituent. Entries can be made manually or automatically based upon another event, such as a thank-you email. By maintaining not only what was sent, where it was sent, and by whom, you can quickly answer questions about who received what and when. History is maintained for gifts and pledges, but you can also view a list of all payments by the constituent, including what it was for, the amount, and the payment details.

Reporting at your user's fingertips

By utilizing The Guru, Orange Leap's reporting, scheduling, and distribution capabilities are extensive and user-friendly, enabling your users to create their own reports with a simple, five-step wizard. No technical expertise, understanding of the schema, or programming skills are required; consequently, there is no need to rely on your IT, administrators, or developers to create and run your reports!